eIMPACT

Community Impact Management

Agency Training Manual

United Way Hastings & Prince Edward

For Support, please contact:

Kaitlyn Lalonde,

Director of Community Impact

klalonde@unitedwayhpe.ca

613-962-9531

Accessing e-CImpact directly from Internet

Requirements: All you need to access e-CImpact is a computer with an internet connection and current version of web browser {example: Internet Explorer, Firefox, Chrome, Safari)

Direct access to the agency site is: https://agency.e-cimpact.com/login.aspx?org=147775

Please bookmark the address to easily access e-CImpact at your convenience.

Accessing the Application

If you are currently funded by United Way Hastings & Prince Edward through the previous annualized allocation process, your agency login and password has been sent to you. All other organizations, please create an account. Instructions follow in this manual.

Please Note:

United Way Hastings & Prince Edward has identified specific long and short term outcomes within each pillar. Successful programs must directly address one of the long term outcomes and one of the short term outcomes and provide directly related strategies that impact the outcomes. Please review the summary document outlining these outcomes, the scoring rubric and detailed guidance letters for each pillar.

Agency Login

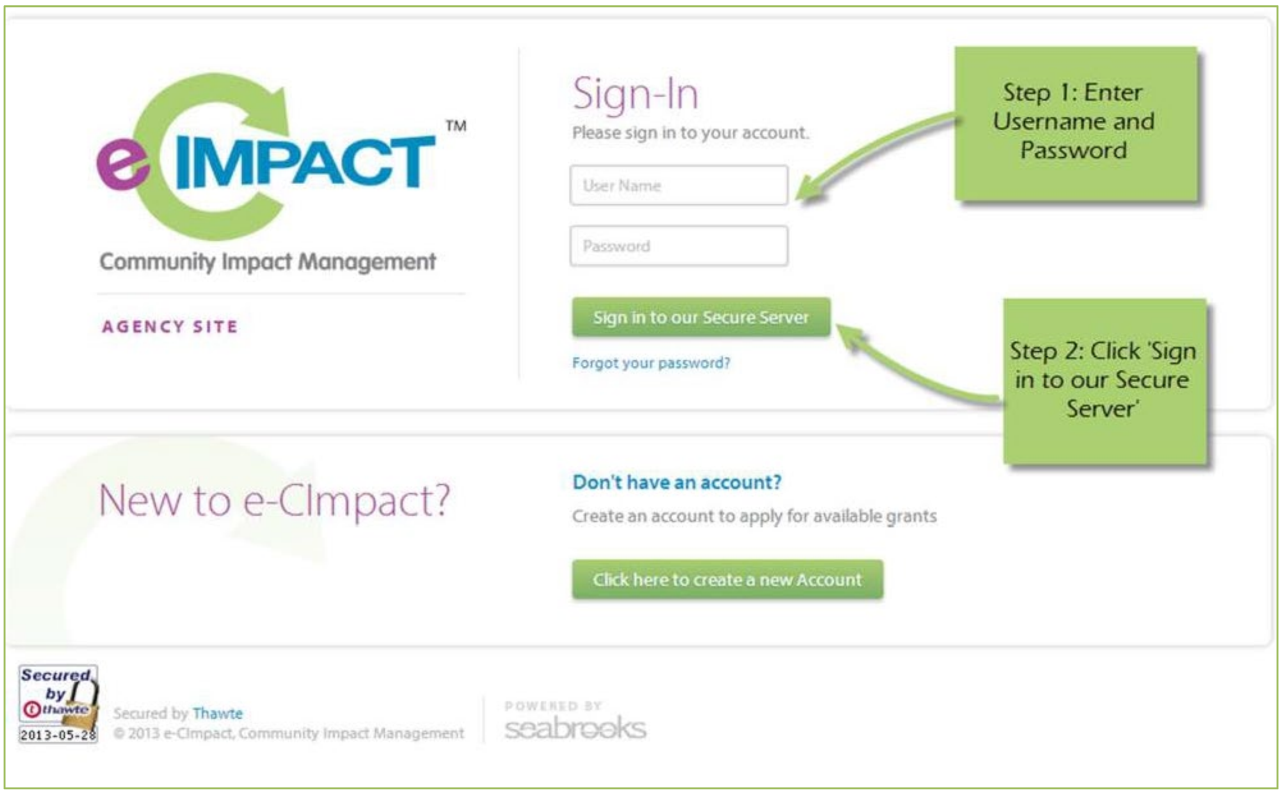
Now that you have accessed the Agency site, it is time to login.

For New Organizations:

Currently, the default agency username is the email address of the agency's primary contact. If you cannot remember your password please contact klalonde@unitedwayhpe.ca to have it reset.

Step 1: Enter your username and password

Step 2: Click 'Sign In to our Secure Server' or use the enter key.

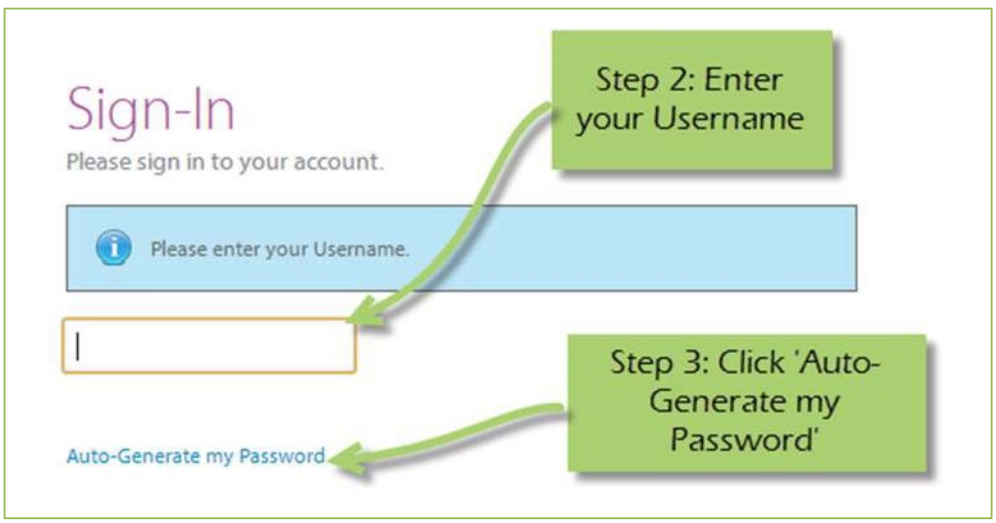


Forgot Password

Step 1: Click 'Forgot your password?' on the agency login page.

Step 2: Enter your username

Step 3: Select 'Auto-Generate my Password'

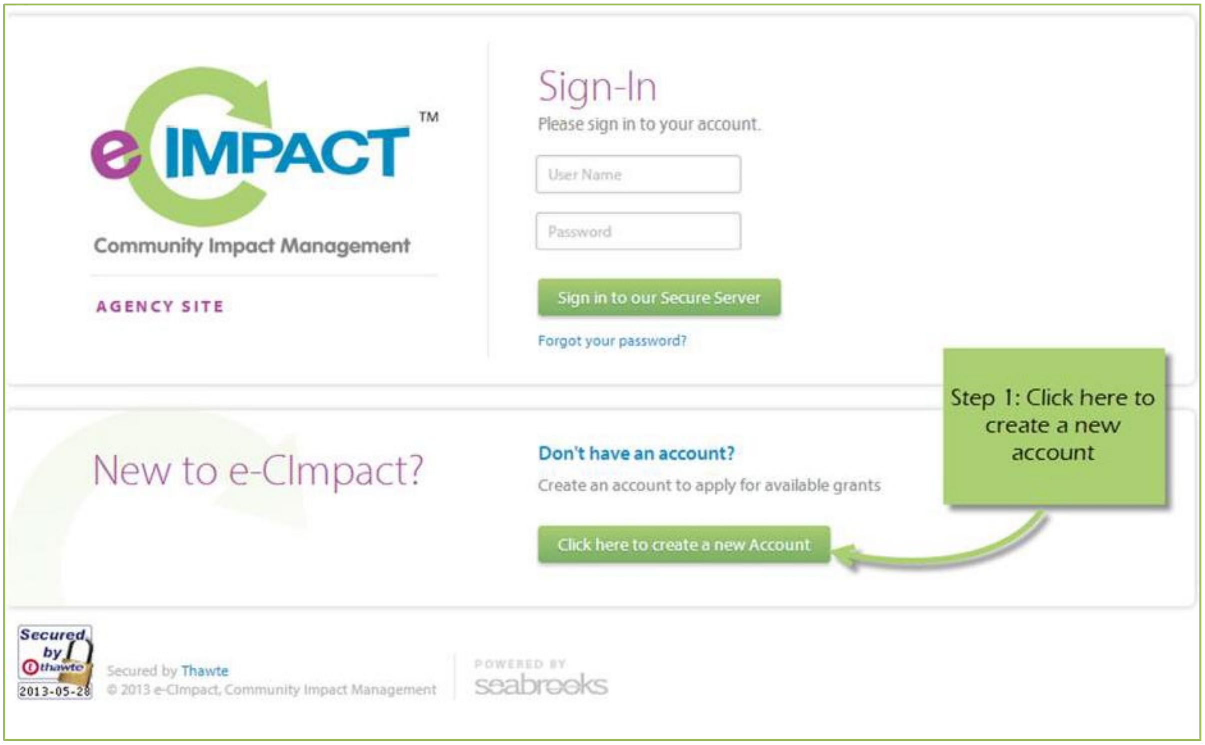


Step 4: Check your email, return to the login page and proceed to login. If you do not see the email in your inbox, be sure to check the 'junk' folder. If the email is not in either, please contact Kaitlyn Lalonde.

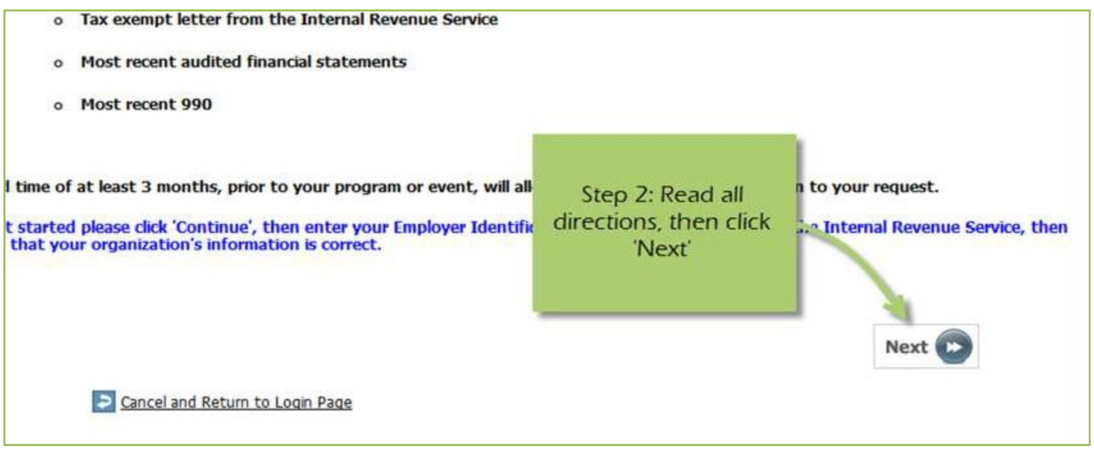
Registering a New Agency

If you do not yet have an agency login account, please proceed with site registration. Registration is required for all agencies.

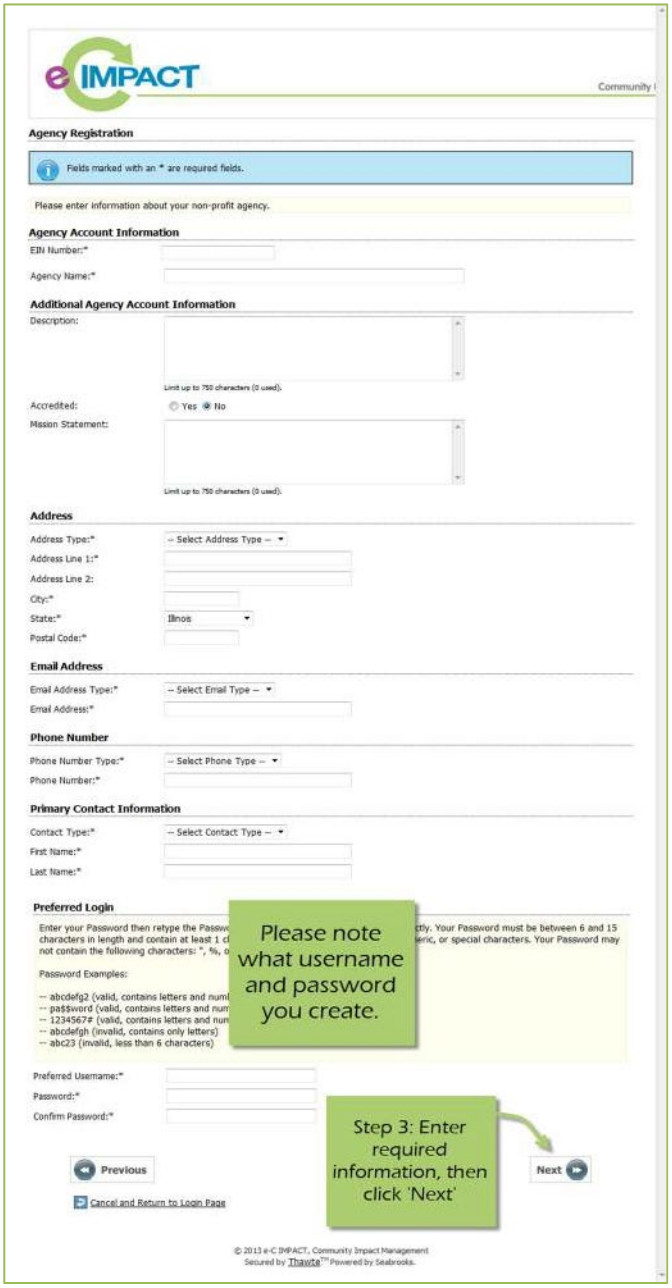
Step 1: From the agency login page select 'Create new agency account'



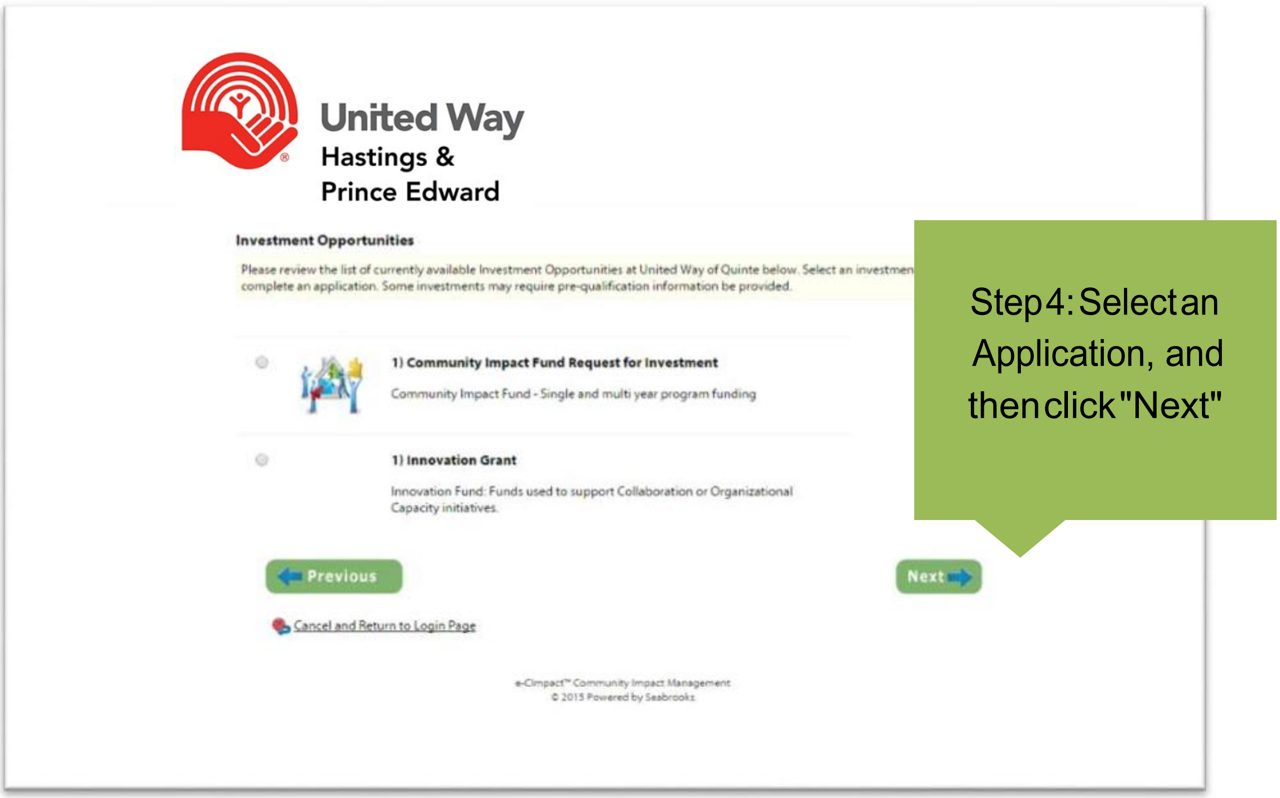
Step 2: Please read all directions carefully, and then click 'Next' to continue with your registration process.



Step 3: Please enter all required information regarding your agency. Then proceed to the next page.

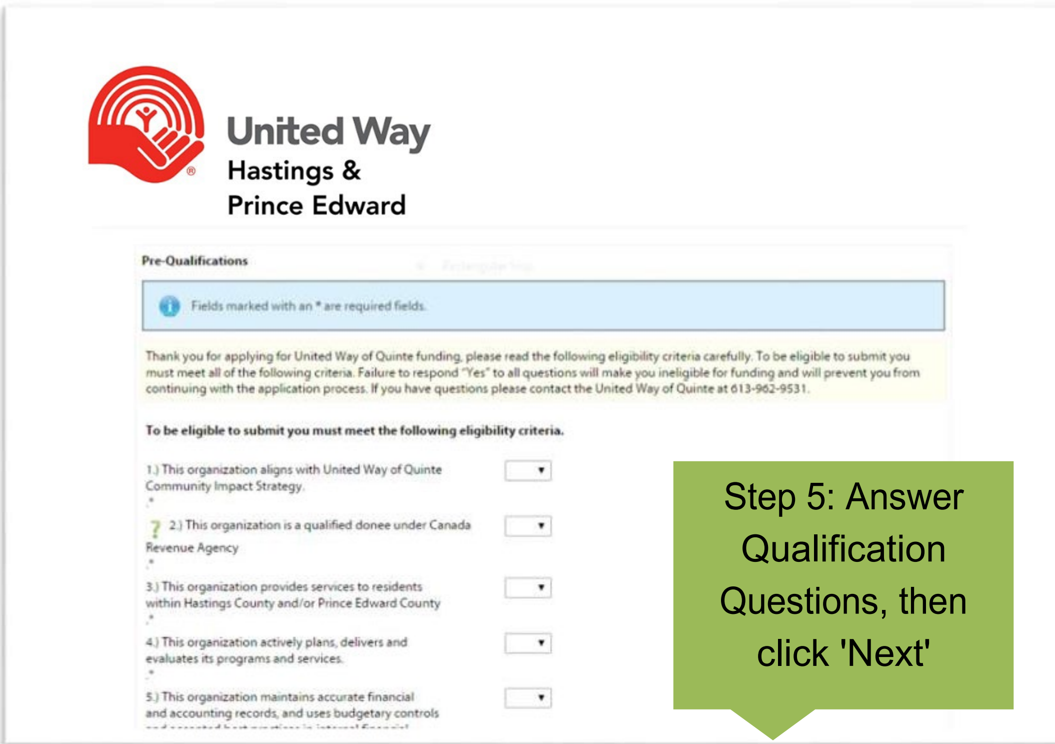


Step 4: Select a grant application you would like to apply for, and then continue to the next page.

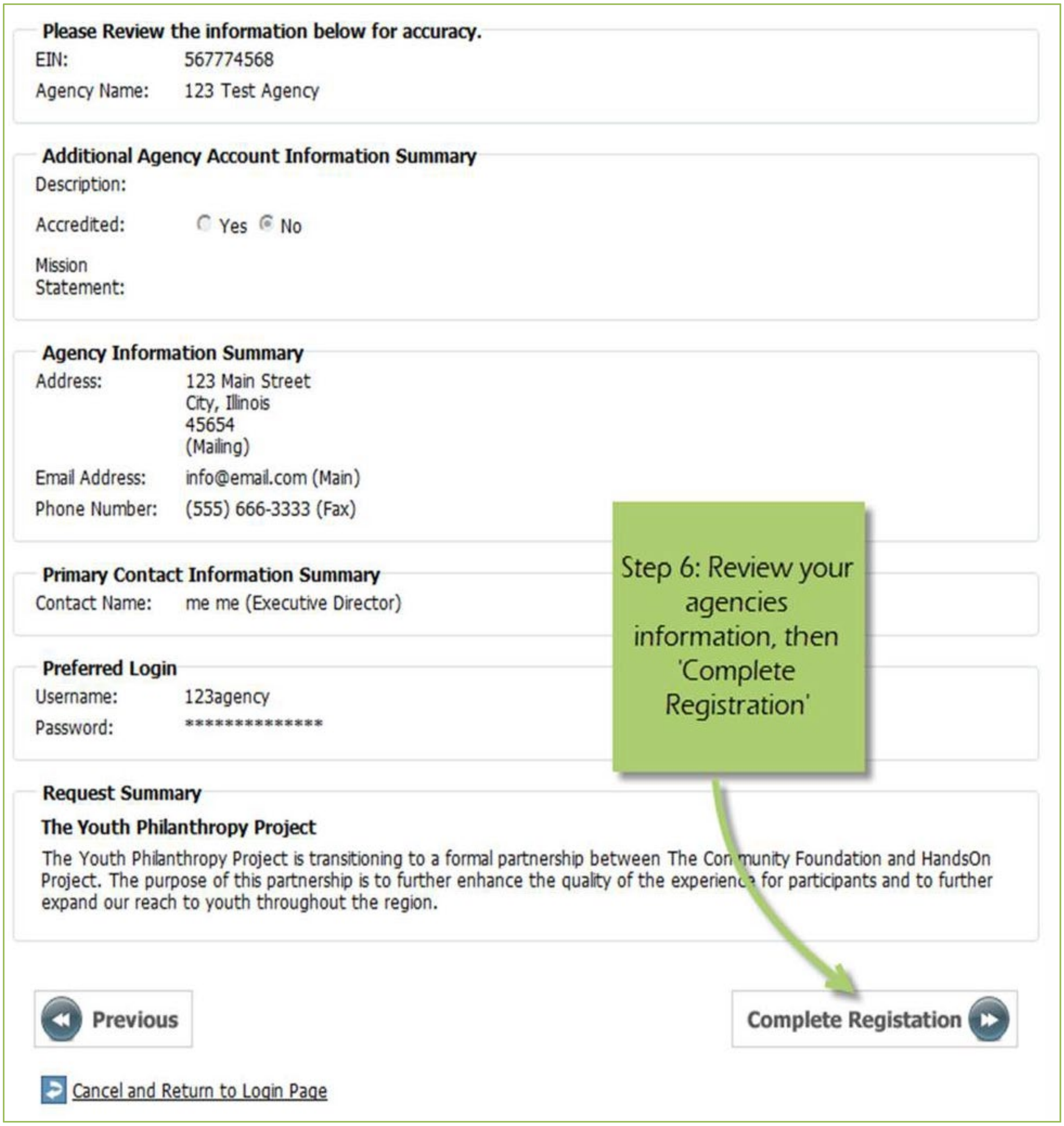


Step 5: Please answer all qualification questions, and proceed to the next page.

If your agency passes the initial qualification questions, you will then move on to confirm your registration. In the event your agency does not qualify, you will be provided information on who to contact should you have any questions.



Step 6: Review all agency information entered, and then click 'Complete Registration'

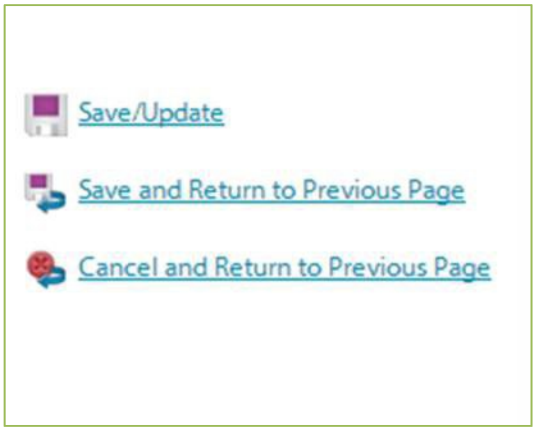


Once your registration is completed you will be able to print your confirmation page. You will also receive a confirmation email. If you have met all pre-qualification terms your registration as an agency through e-CImpact will automatically approved and you can proceed to completing the application.

Note: You can also access the e-CImpact Agency Training Manual by going to the resource center located in the lower left side of the agency homepage.

Common Navigation

The navigation links in e-CImpact are consistent throughout the site.

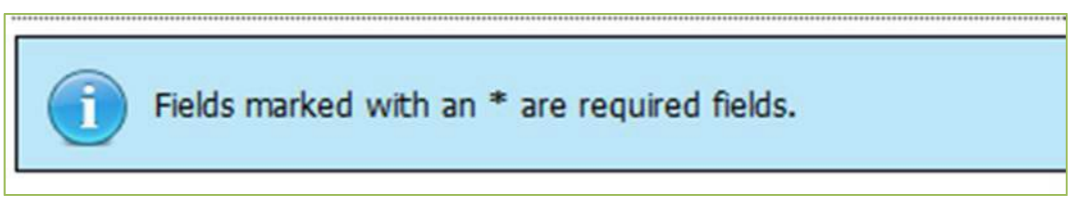


Save/Update: Refreshes the page while saving any changes made to your data. Note: any changes won't display unless you save/update.

Save and Return to Previous Page: Returns you to the page last visited while saving any changes made to your data.

Cancel and Return to Previous Page: Will return you to the previous page and will NOT save any changes made to your data.

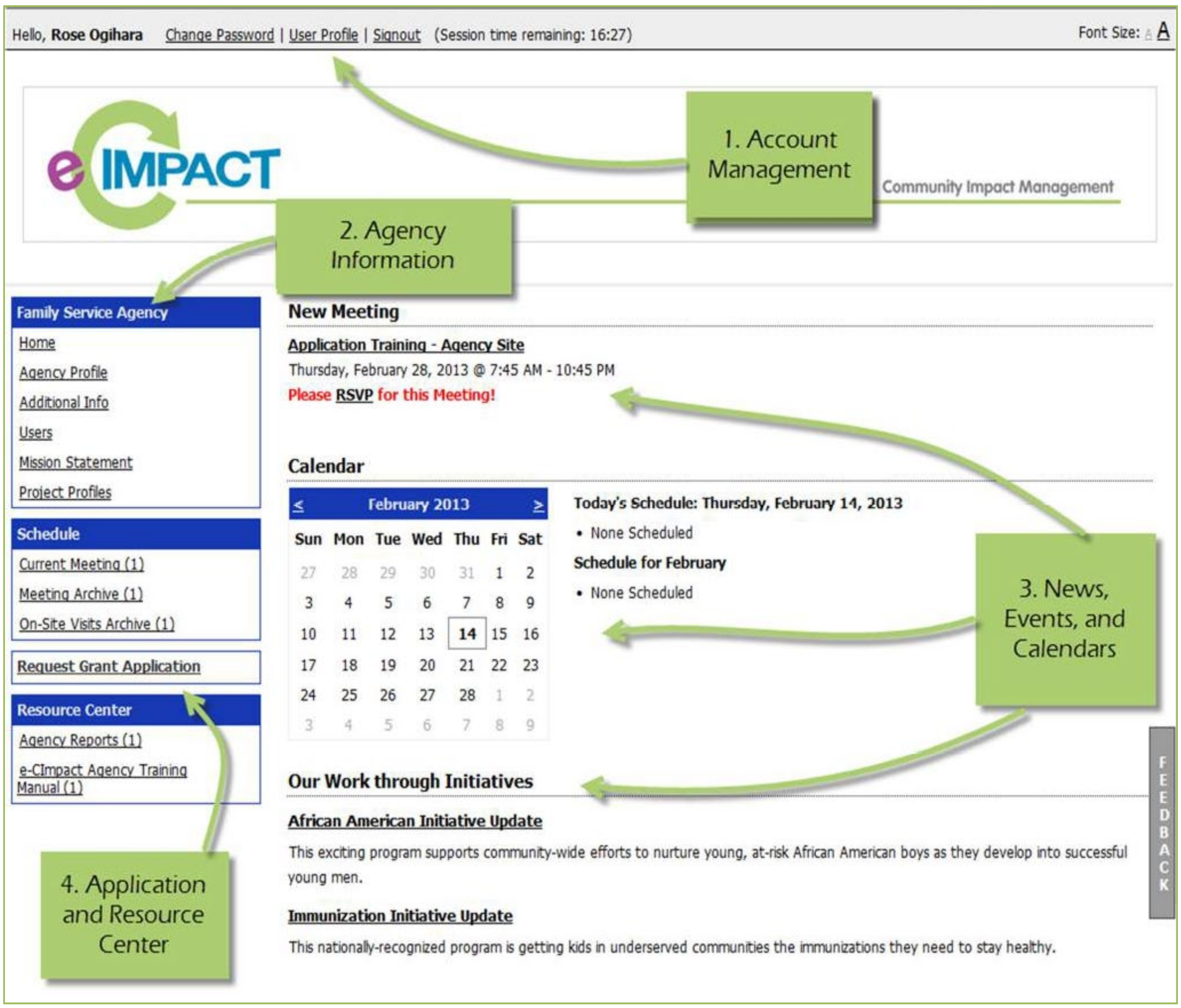
Changing the Font Size: Located in the upper right hand corner of the agency site, click the large 'A' to increase the font size. Click the smaller 'A' to decrease the font size.



Agency Site Home Page

From the home page you will be able to access all parts of the agency site. There are four basic sections:

1. Account Management
2. Agency Information
3. News, Events, and Calendars
4. Applications and Resource Center



Account Management

Change Password

Step 1: To change your password, select 'Change Password'

Step 2: Enter the old password

Step 3: Then enter the new password two times.

Password Rules:

- Must be between 6 and 15 characters.
- Must contain at least 1 character from 2 of the groups of alpha, numeric, or special characters.
- Characters <u>NOT</u> accepted are: ", % or any white-space.

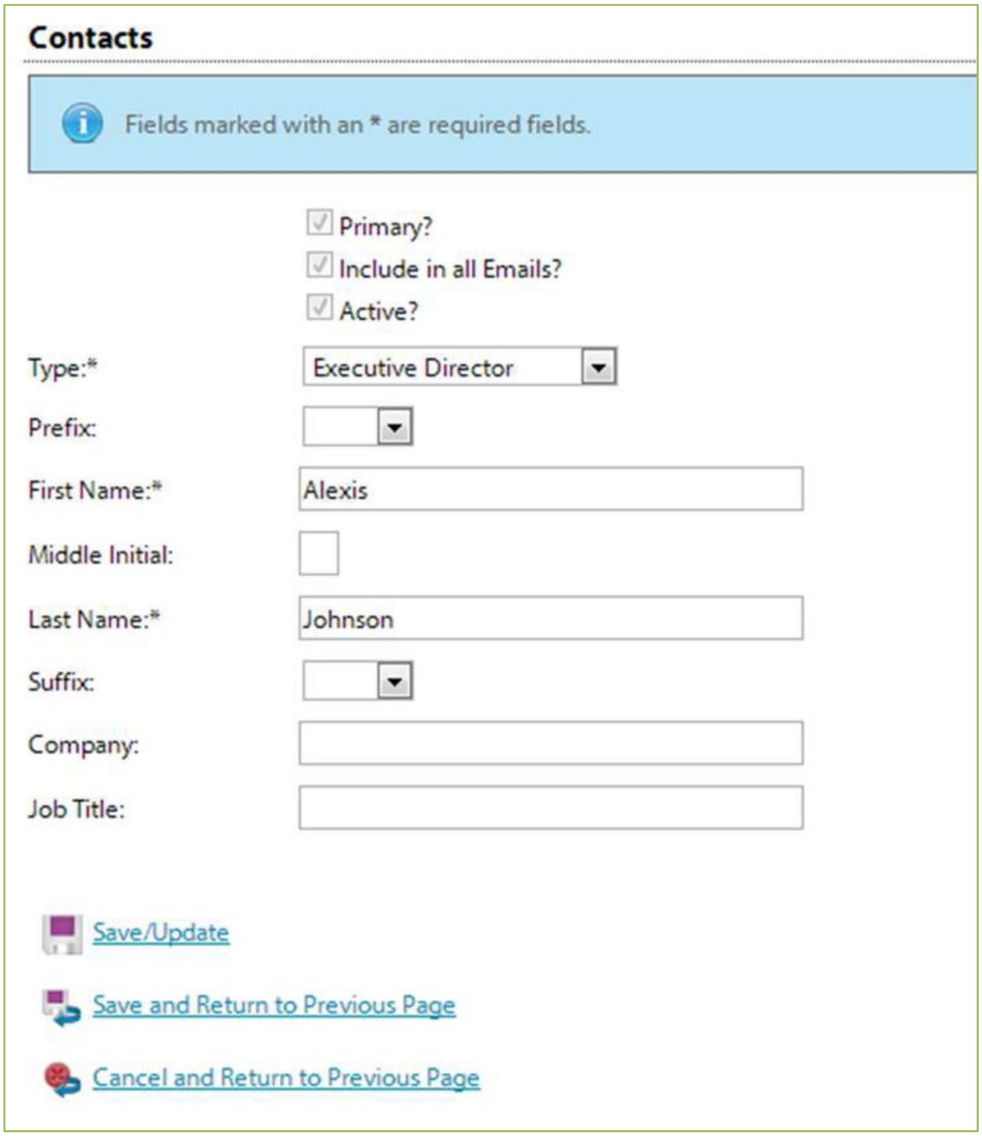
User Profile

The User Profile area is where you are able to add, edit, or delete any of your information including: primary contact, basic information, email addresses, phone numbers, and mailing addresses. Users may also choose to be 'Included in all Emails'.

Primary Contact: There can only be one primary contact per agency. This can be set by selecting the check box 'Primary?'. The primary contact is automatically included in all emails and cannot be deactivated unless a new primary contact is selected.

Include in all Emails: This allows users to receive <u>all</u> emails sent through e-CImpact. Users who do not select 'Include in all Emails?' will only receive emails that appropriate for their position.

Active: Make sure your account is 'Active'. Once a user is deactivated you will need to contact Kaitlyn Lalonde, klalonde@unitedwayhpe.ca to reactivate the user account.



Enter any necessary information, and then click 'Save/Update'.

Signout

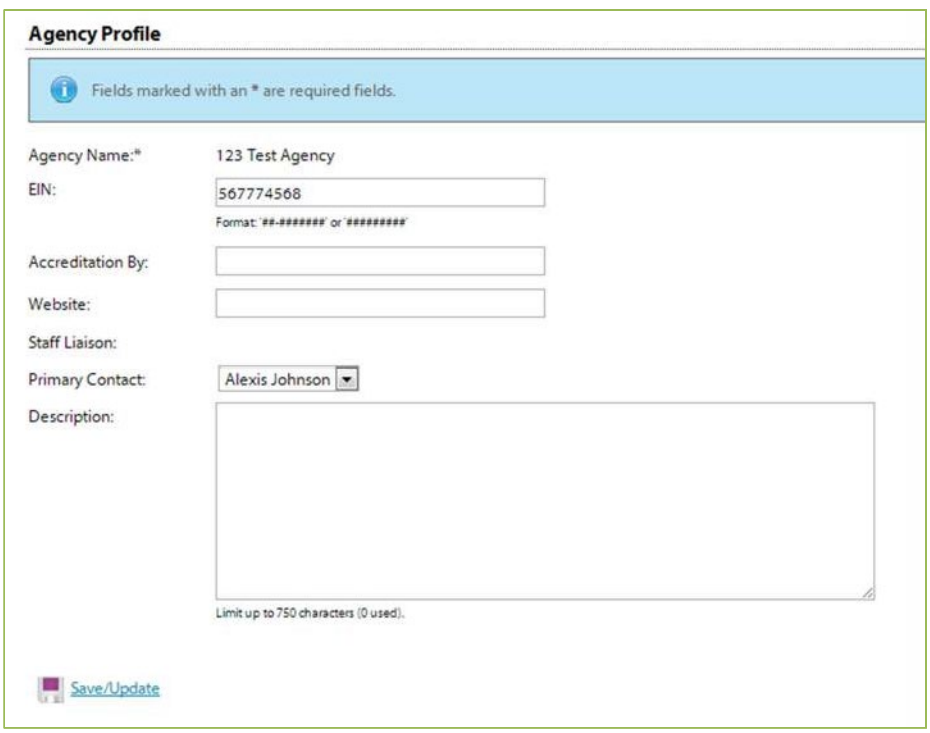
Users should 'Signout' of e-CImpact to ensure the security of their data. Once signed out of e-CImpact, press the 'X' in the upper right hand corner of your browser to close the window.

Agency Information

The Agency Information section is where account information, contacts, statements (mission / vision / agency) and program information is housed. From this section you will be able to update your address(es), or contact information.

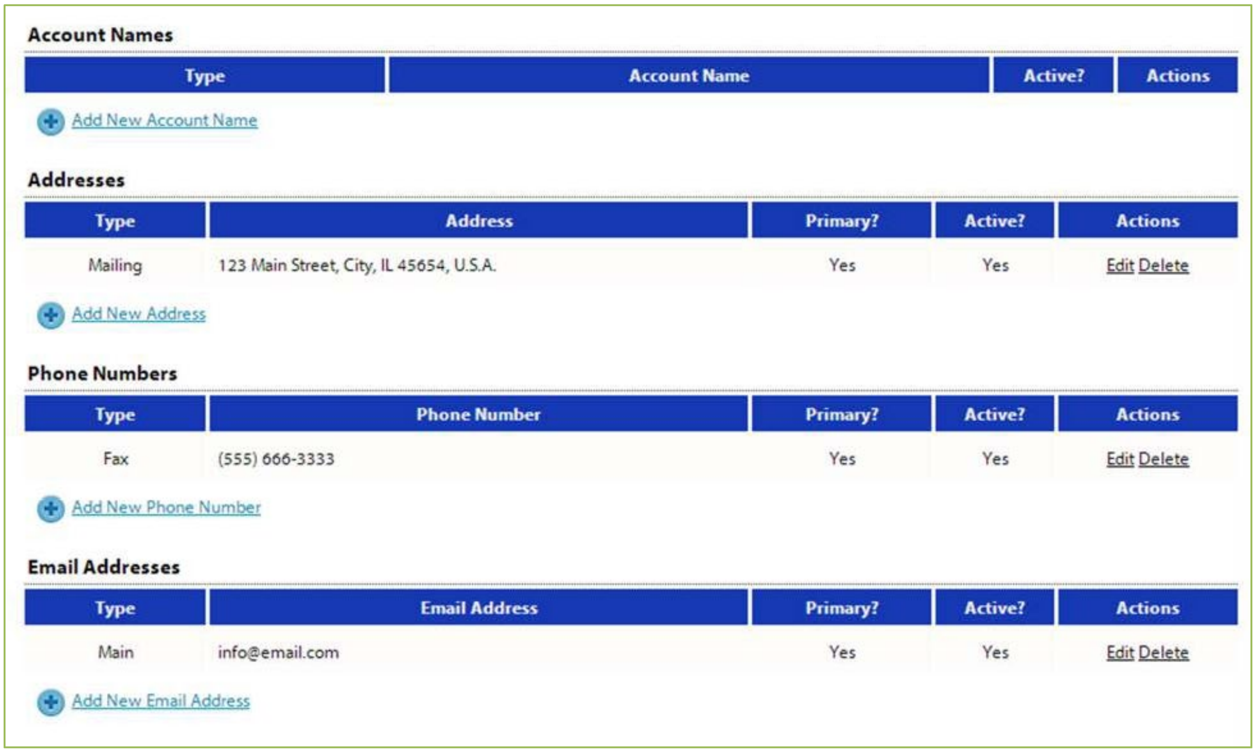
Agency Profile

The profile page is where all agency specific information is housed and can be updated. This includes the basic information - agency name, staff contact, primary contact, website, etc.



Account name(s), address(es), phone number(s) and email address(es)

You may also add, edit or delete account names, address, phone numbers and email addresses. Agencies are able to have multiple records for each section.



Account Names

Type	Account Name	Active?	Actions

Add New Account Name

Addresses

Type	Address	Primary?	Active?	Actions
Mailing	123 Main Street, City, IL 45654, U.S.A.	Yes	Yes	Edit Delete

Add New Address

Phone Numbers

Type	Phone Number	Primary?	Active?	Actions
Fax	(555) 666-3333	Yes	Yes	Edit Delete

Add New Phone Number

Email Addresses

Type	Email Address	Primary?	Active?	Actions
Main	info@email.com	Yes	Yes	Edit Delete

Add New Email Address

<u>'Account Names'</u> is a place for any other names for your agency, or if your agency name is abbreviated you may place the legal name here.

Agency Contacts

When adding a new record, or updating existing records, be sure to select 'Active' appropriately.

'Primary' can only be selected for one record.

To view all agency contacts - click 'Contacts' from the agency information section on the homepage.

From this area you will be able to see anyone who is currently listed as a contact at your agency, as well as add, edit, deactivate or delete an agency contact.

The agency contact profile page is similar to the user profile and contains the same information.

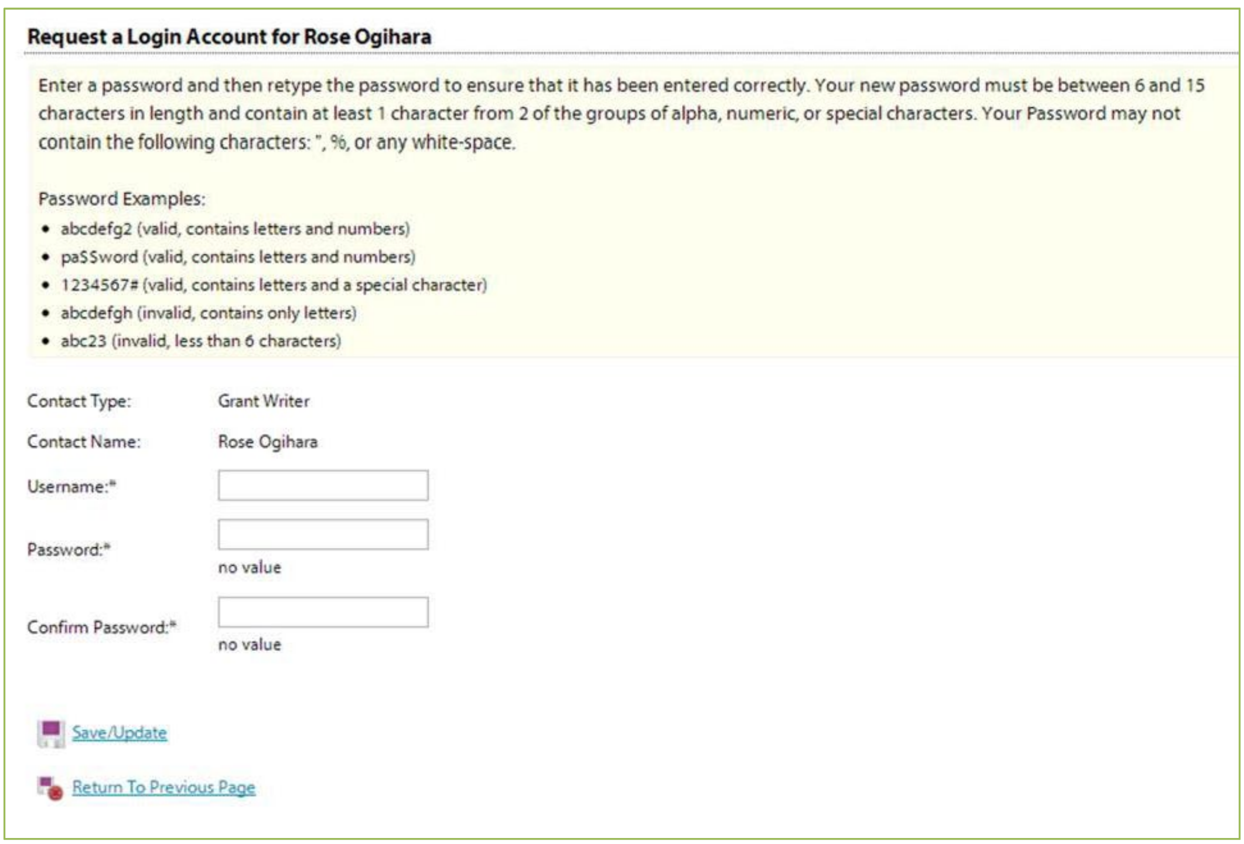
- Name and preference
- Email addresses
- Phone Numbers
- Addresses

Request a Login: Once a new contact has been created, you are able to request a login for this user.

Step 1: Click 'Request a Login'

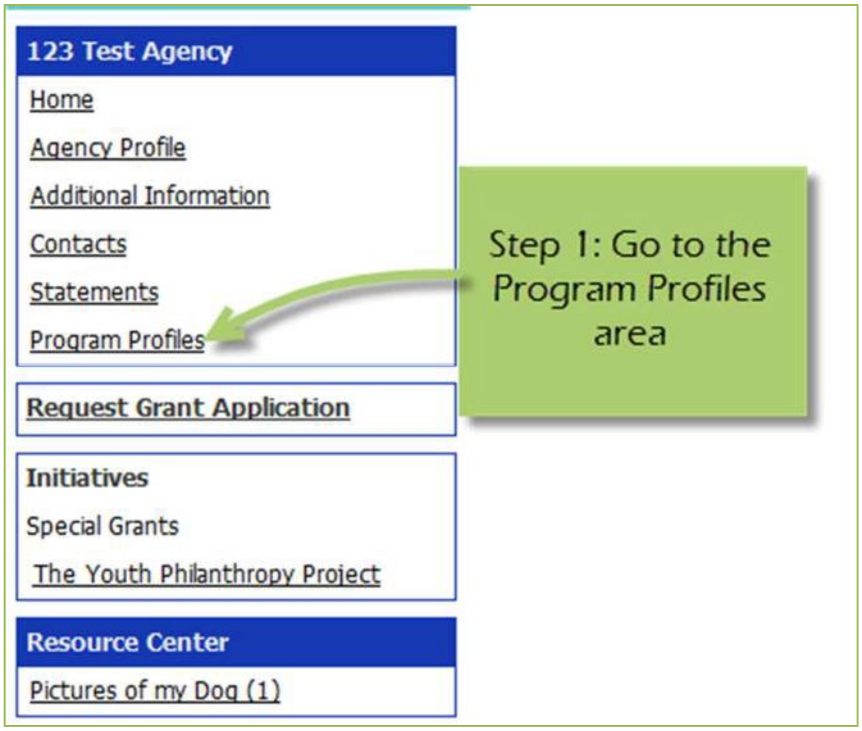
Step 2: Enter username and password.

*A contacts email address is commonly used as the username due to email addresses being unique.



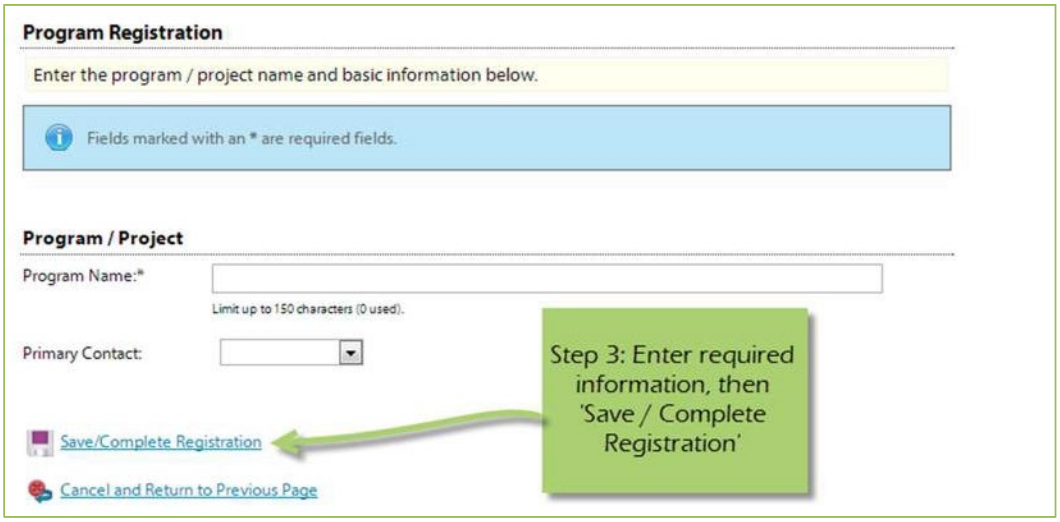
Registering a New Program

Step 1: Go to the programs area by selecting 'Program Profiles'



Step 2: Select 'Click Here to Register a New Program'

Step 3: Enter all required program information, and then select 'Save / Complete Registration'



After selecting 'Save/Complete Registration' you will be directed to the program profiles page, here you will see a validation message stating that you have successfully registered your program.

Updating Program Information

Step 1: To edit a program, go to the program profiles area.

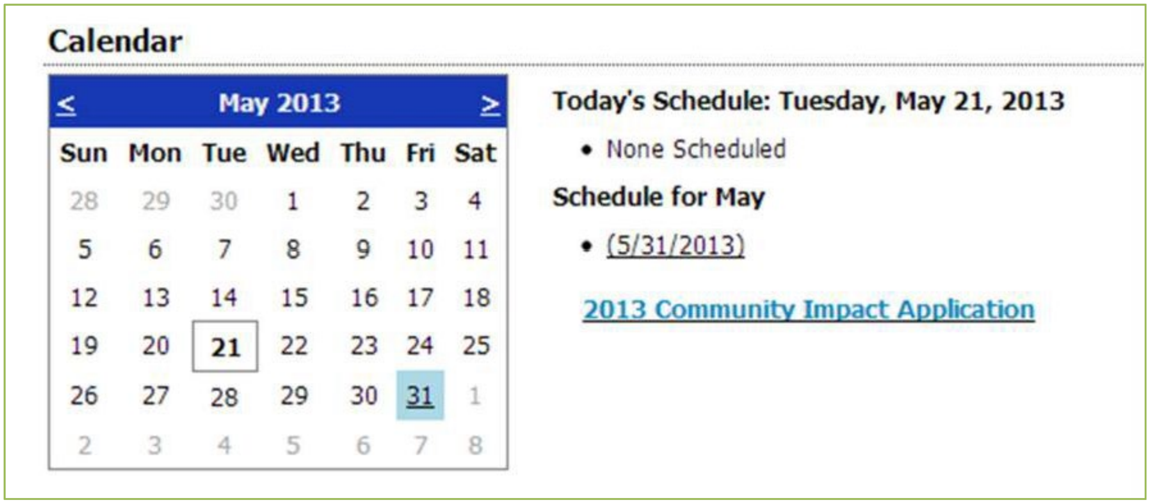
Step 2: Select 'Edit' next to the desired program.

From here you will be able to update information as needed.

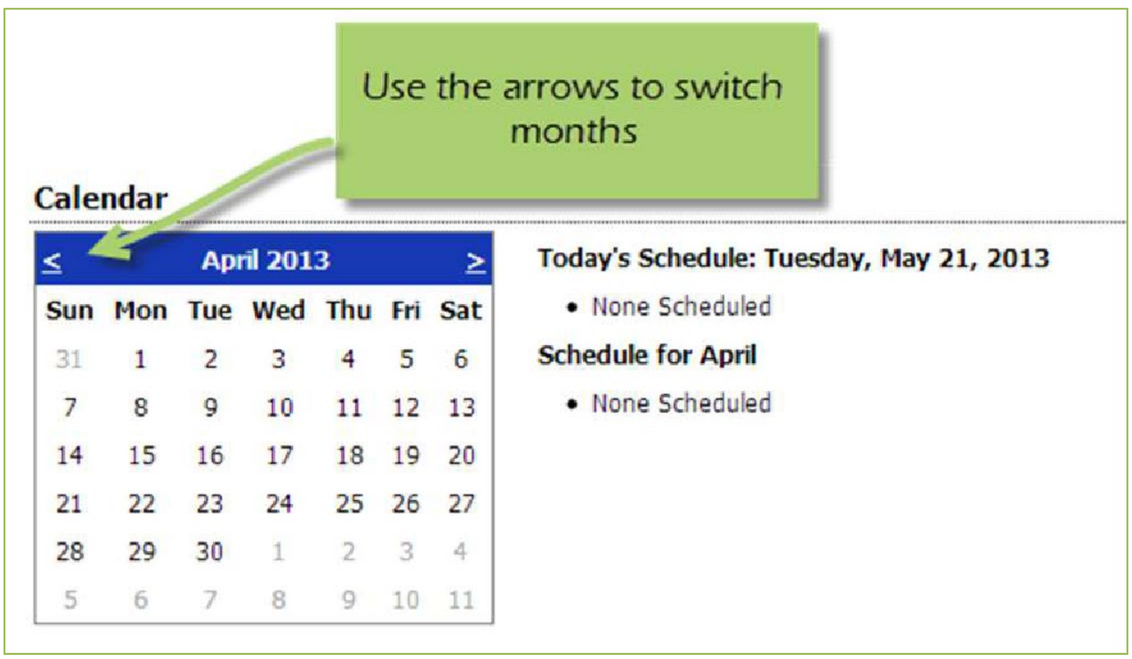
Calendar

The calendar area will display any events or site visits you have RSVP's for. Some news items will display here as well.

Please note that the items listed in the calendar area are specific to the selected month.



If you wish to view items from another month use the arrows to switch months.



Site Visits

When offered, you are able to select dates available for volunteers to come and visit your agency site.

Step 1: To access the site visit area select 'Current Site Visit'

Step 2: Select 'Reserve Time Slot' for the agency or program.

Step 3: Choose the date and address desired.

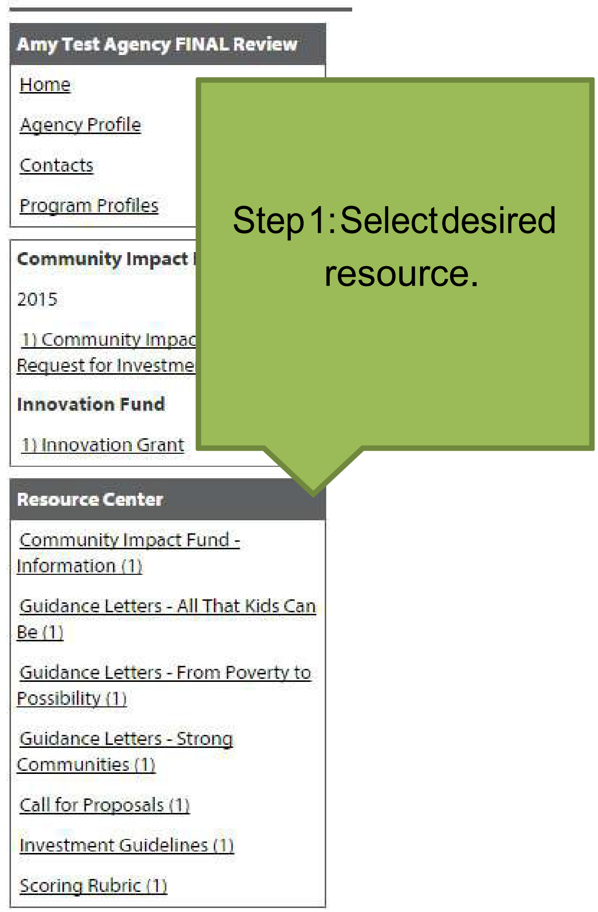
Step 4: 'Save/Update' or 'Save and Return to Previous Page'

Resource Center

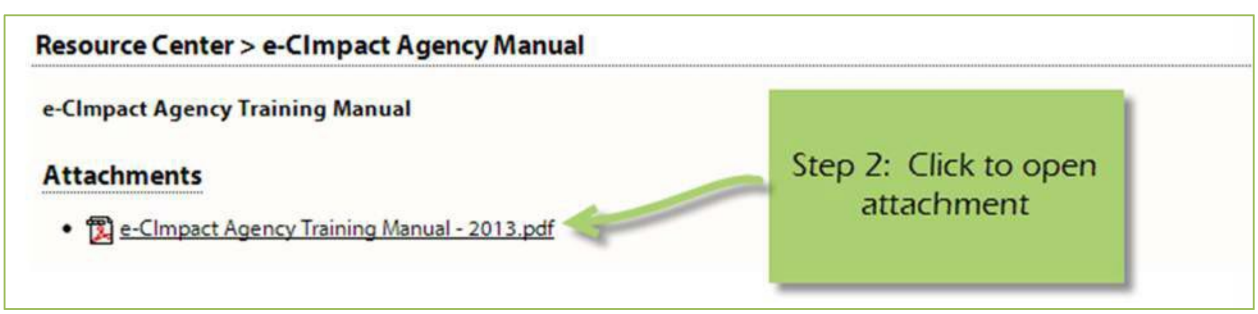
The agency resource center is where you will be able to find any documents you may need to reference from United Way Hastings & Prince Edward. The resource center is located in the lower half of the left hand navigation.

Accessing Resources

Step 1: Select desired resource item



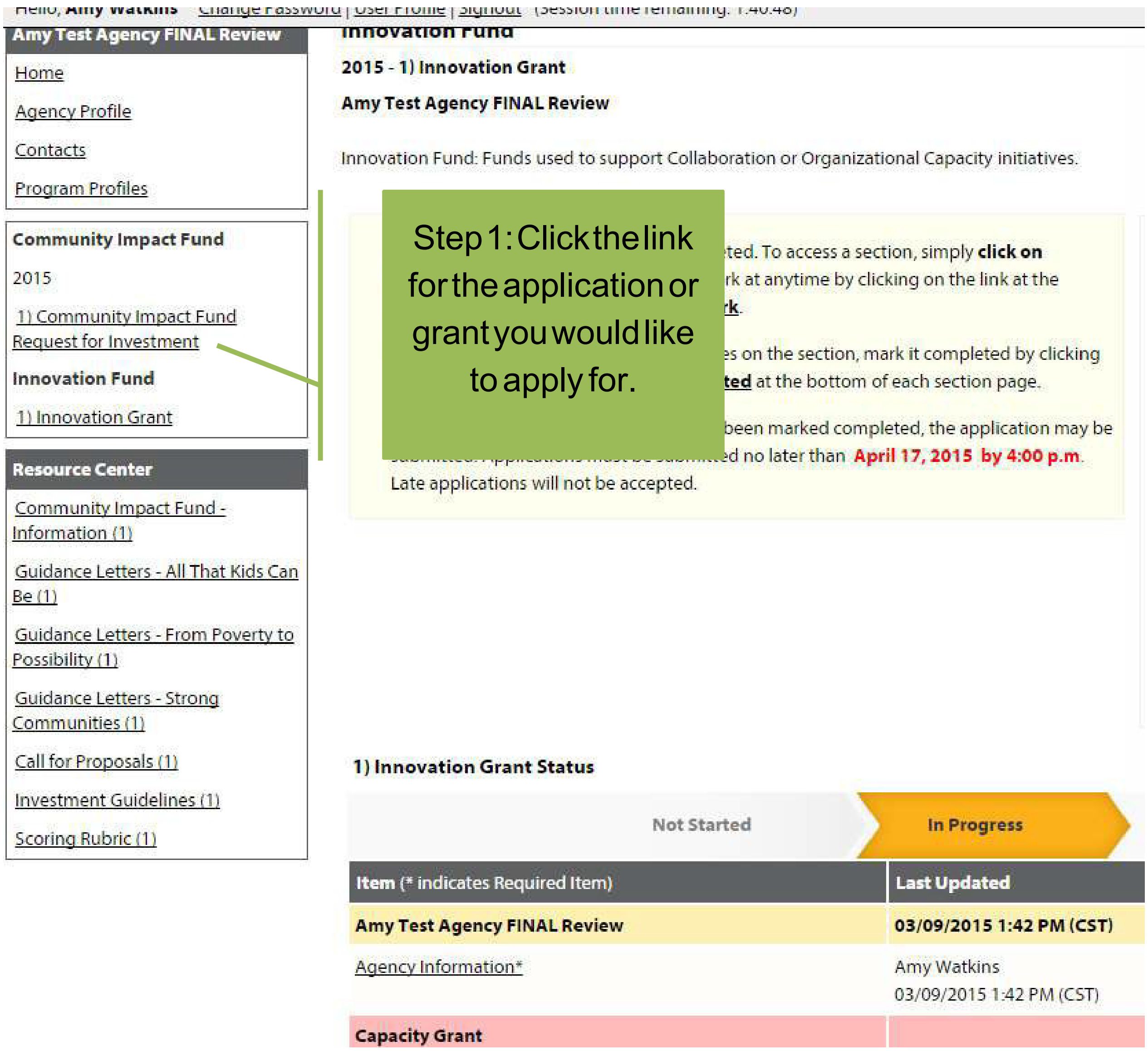
Step 2: Click on the attachment link to open



The Basics of your Applications / Grant Process

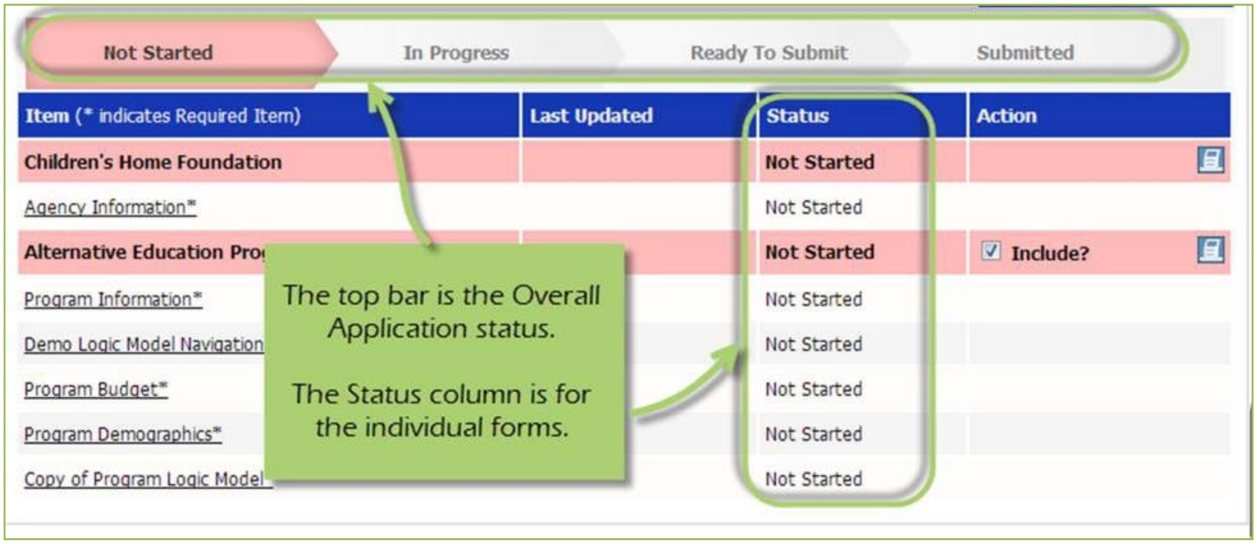
Accessing Application / Grant Process

Step 1: Choose the application or grant process from the list located in the left hand navigation.



Form Status

This page works much like a check list. You are able to easily see how much of your application you have submitted.



Not Started: When the application or form is in not started status, it means that no data has been entered yet.

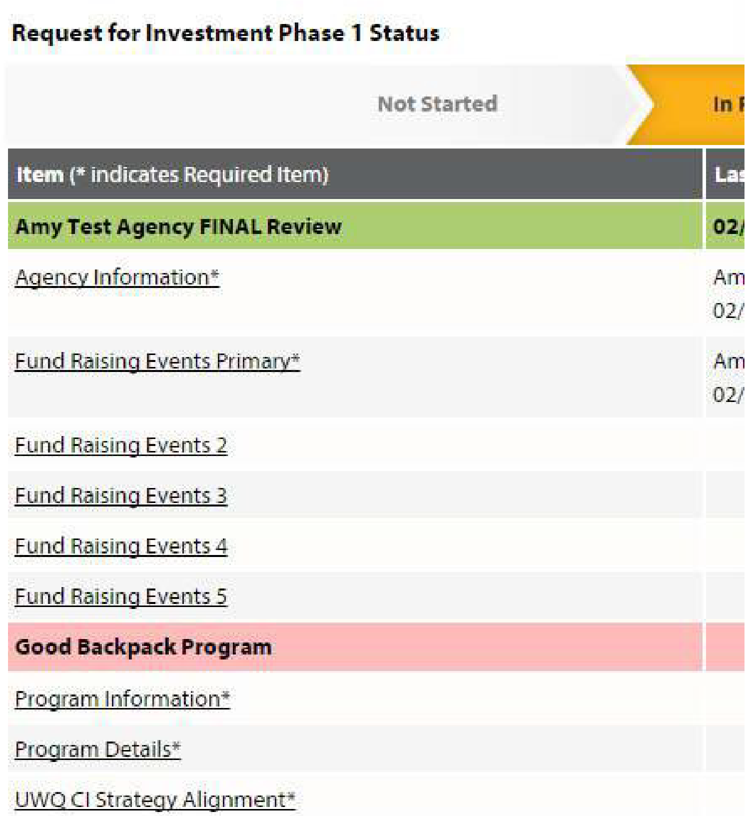
In Progress: If you form is set to in progress, then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

Ready to Submit: Once all forms are marked completed, your top bar should move to 'Ready to Submit'. At this stage you should review any information entered, then move on to submit your application.

Submitted: When an application is in submitted status, you will no longer be able to make changes to the information on the forms. If you submit, and find you need to make an edit, you should contact Kaitlyn Lalonde before the annual application deadline to make any adjustments.

Entering Information

To begin filling out your application click on the desired form:



Save Options

After entering information on your forms, you have multiple save options.

Save My Work / Save My Work and Return to Previous Page: These options are for when you need to save, or move on to something else, and are not finished entering information.

Save My Work and Mark as Completed: This option is for when you have entered and reviewed your information and are ready to turn it in.

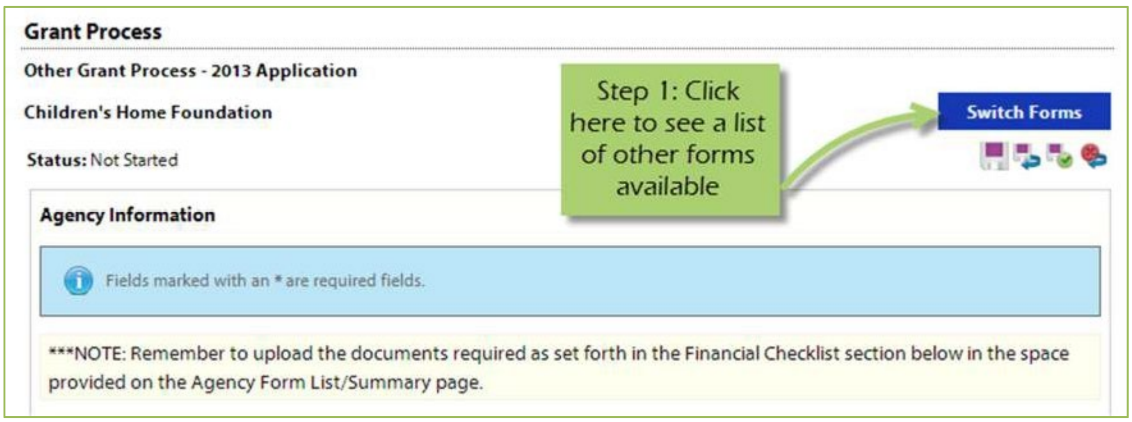
Switching Forms

There are two ways to switch forms within an application:

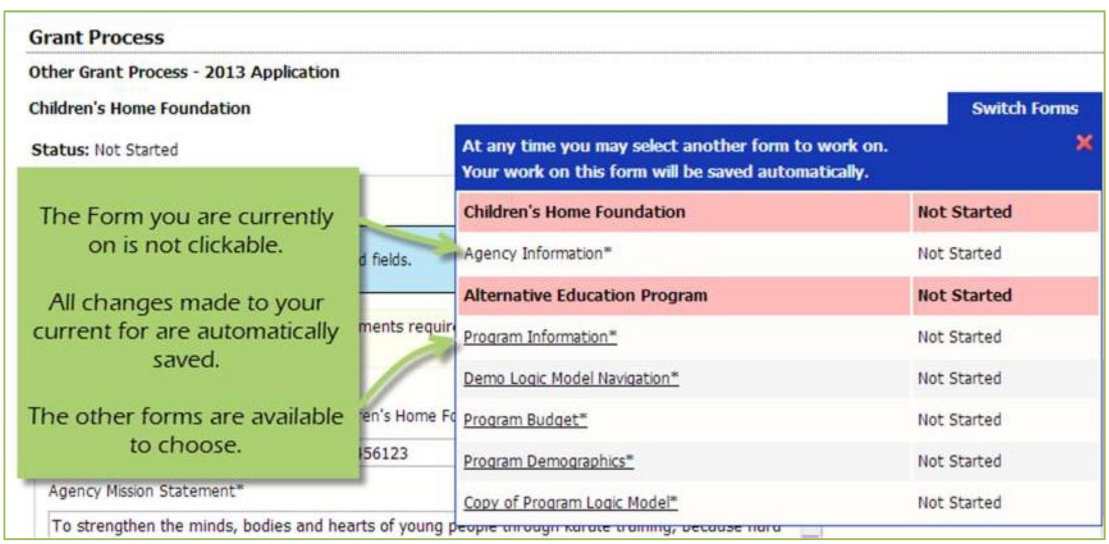
First: When you are finished with one form, click on 'Save My Work and Return to Previous Page', and then select the next form.

Second: You can use the 'Switch Forms' option, located in the upper right hand corner.

Step 1: Click 'Switch Forms' to view the list of available forms.



Step 2: Click on the form you would like to move to.



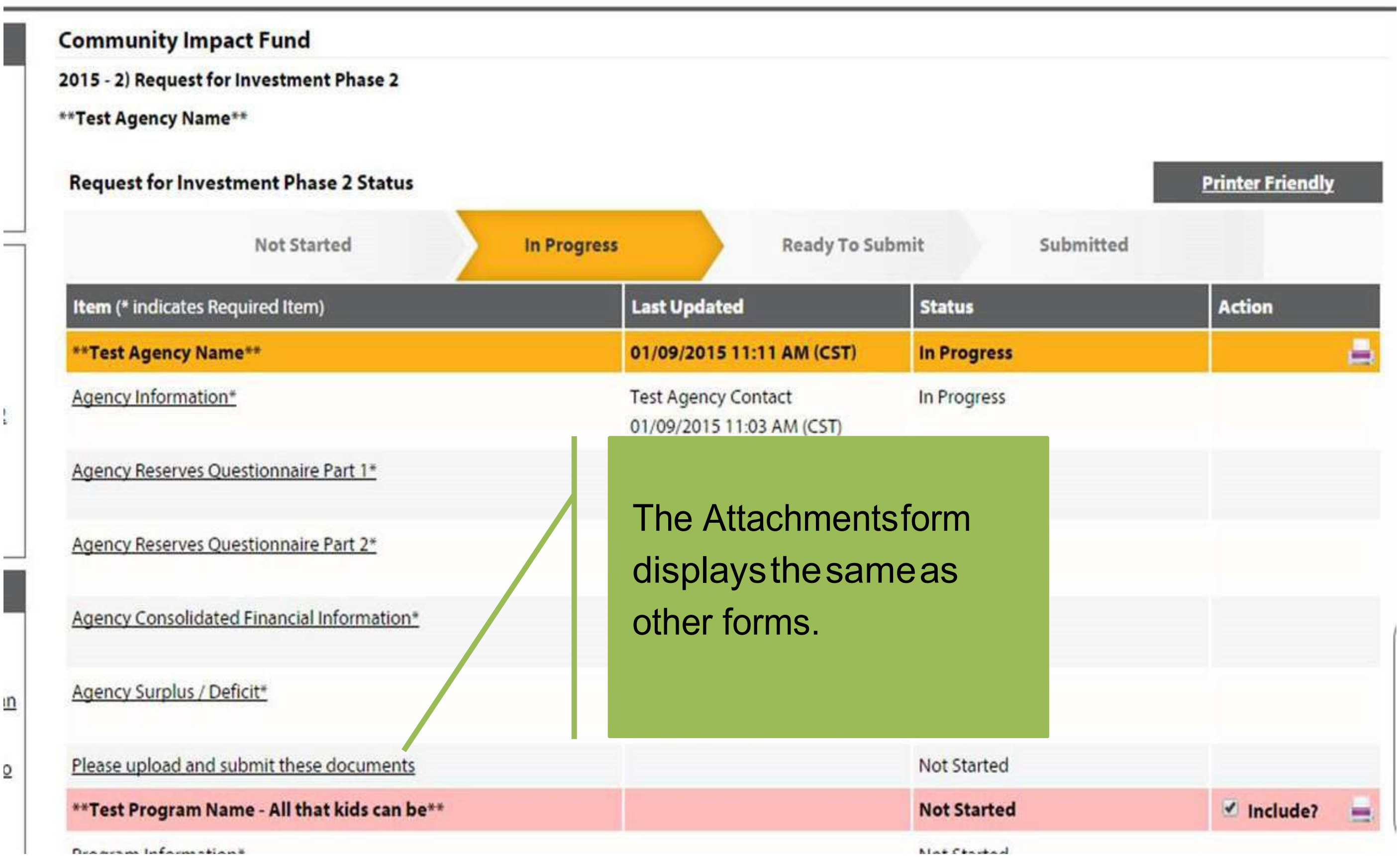
Attachments

Uploading Attachments

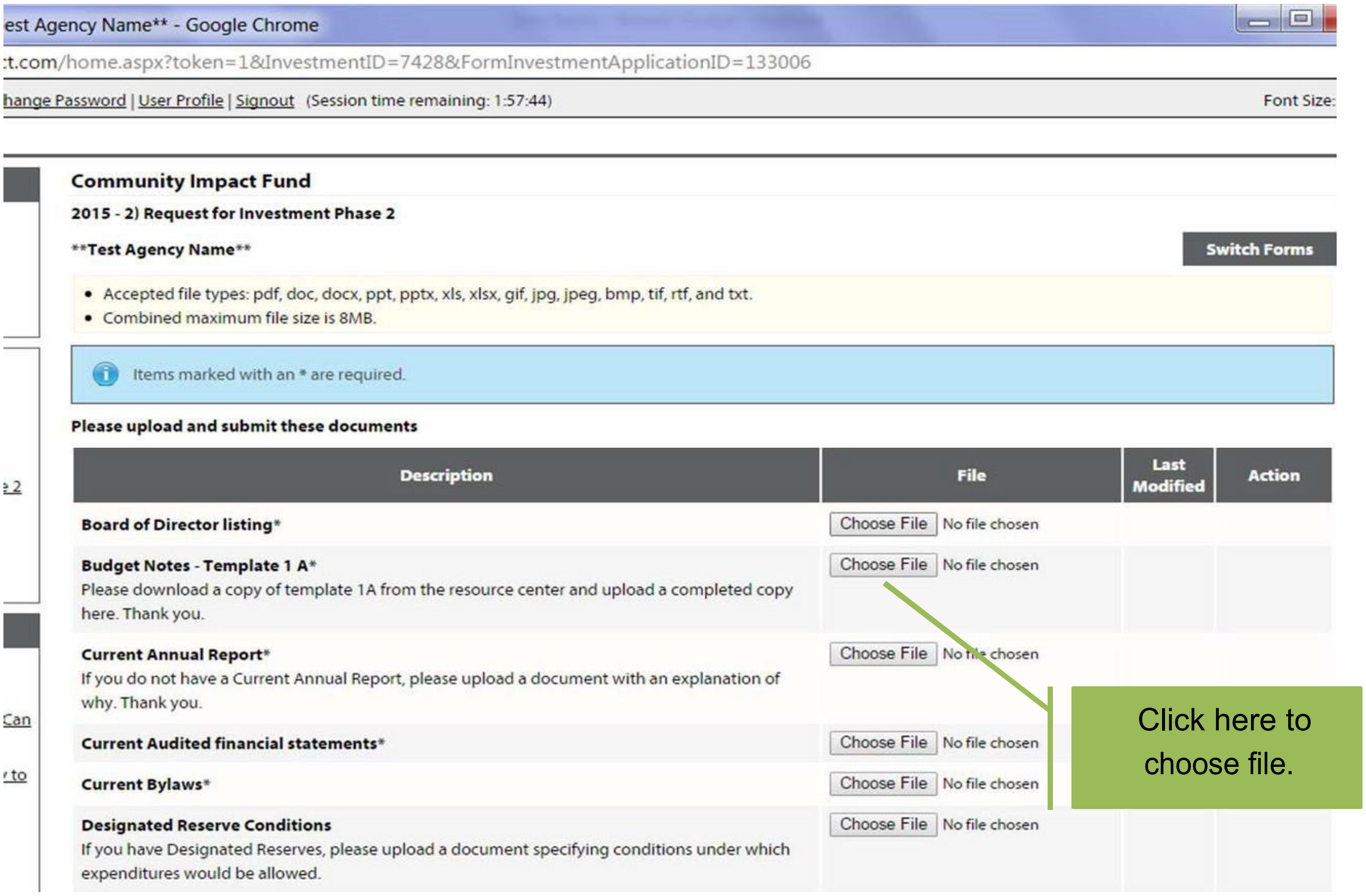
Excepted file types for uploading documents:

- Accepted file types: pdf, doc, docx, ppt, pptx, xls, xlsx, gif, jpg, jpeg, bmp, tif, rtf, and txt.
- Combined maximum file size is 8MB.

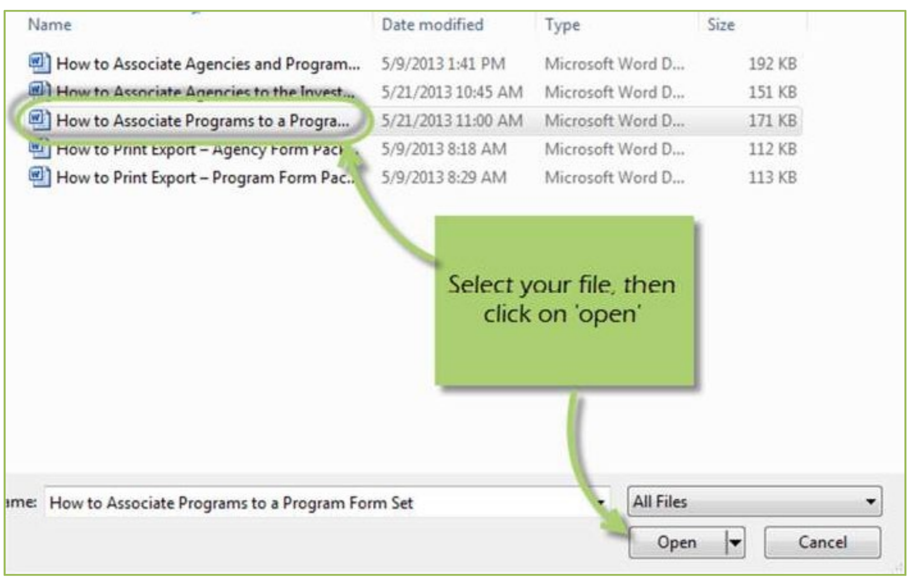
Step 1: Open 'please upload and submit these documents'



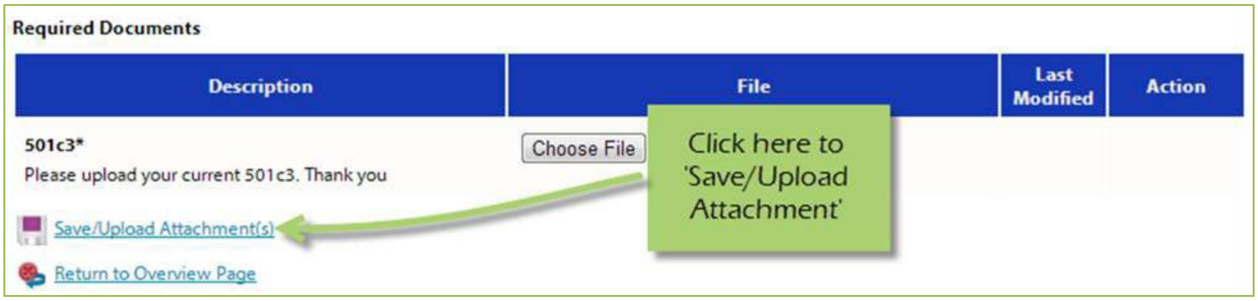
Step 2: Once you have confirmed your document meets the upload requirements, click 'Choose File'.



Step 3: Browse your computer, and select the desired document.

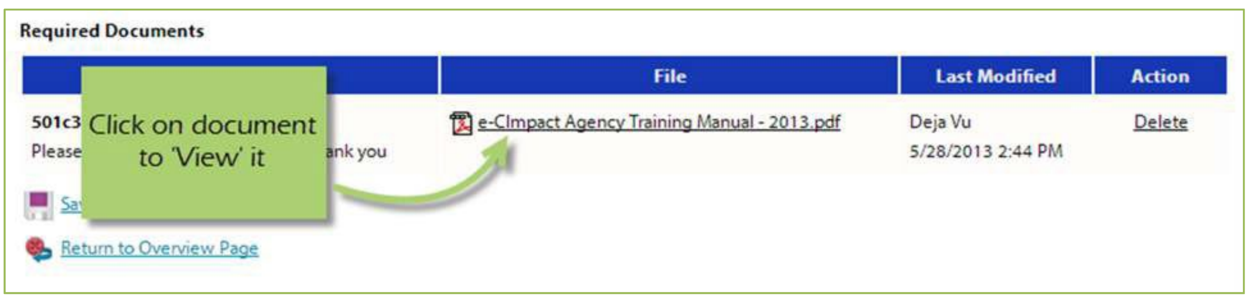


Step 4: 'Save/Upload Attachment(s)'



Viewing Attachments

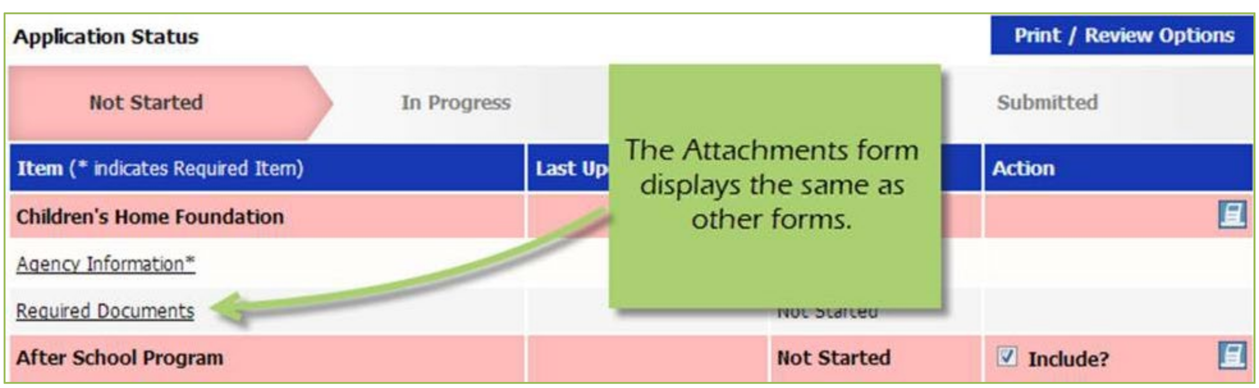
Step 1: Click on the document name to download and open it.



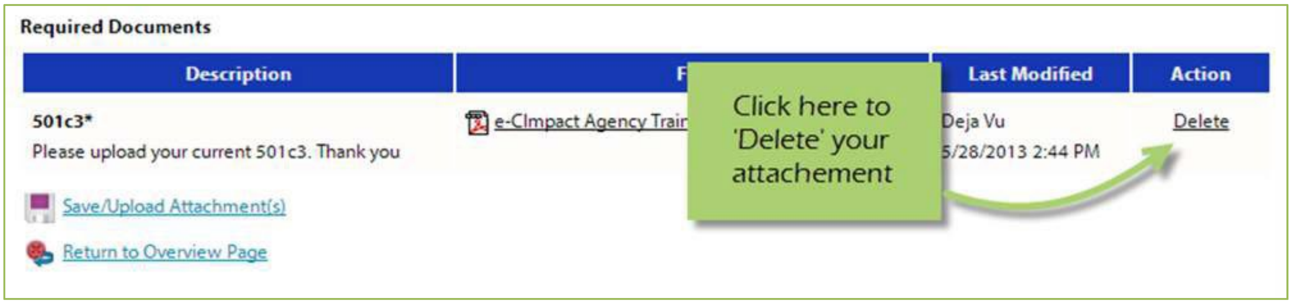
Deleting Attachments

In the event the wrong document was uploaded you may need to delete your attachment.

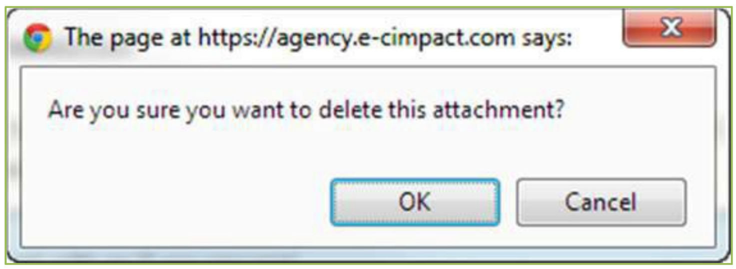
Step 1: Open 'please upload and submit these documents'



Step 2: Select 'Delete' next to the desired document



Step 3: Confirm you would like to delete this attachment



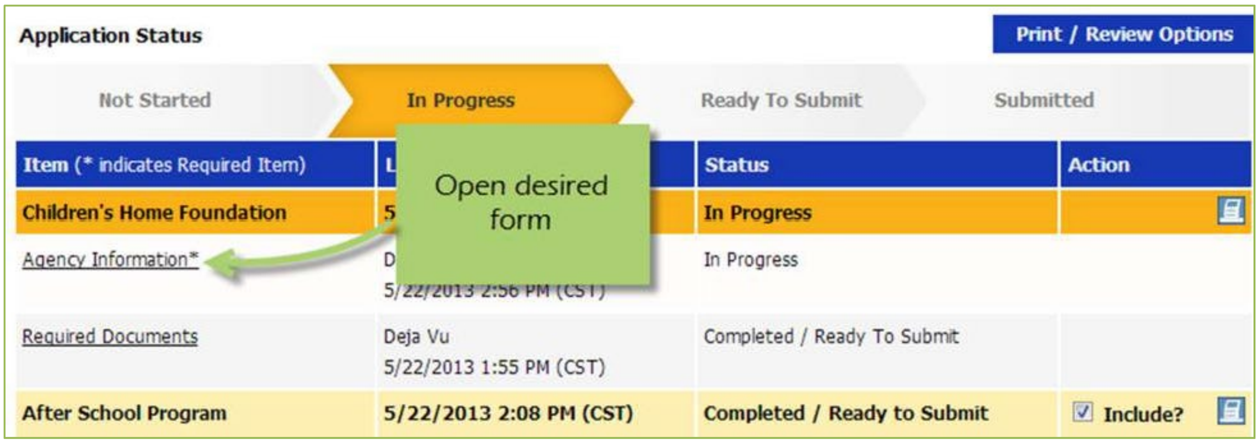
You are now able to upload the correct attachment. Repeat uploading attachments steps.

Submitting Application

Mark Forms 'Complete / Ready to Submit'

In order to submit your application, you must mark ALL forms 'Completed / Ready to Submit'

Step 1: Open form

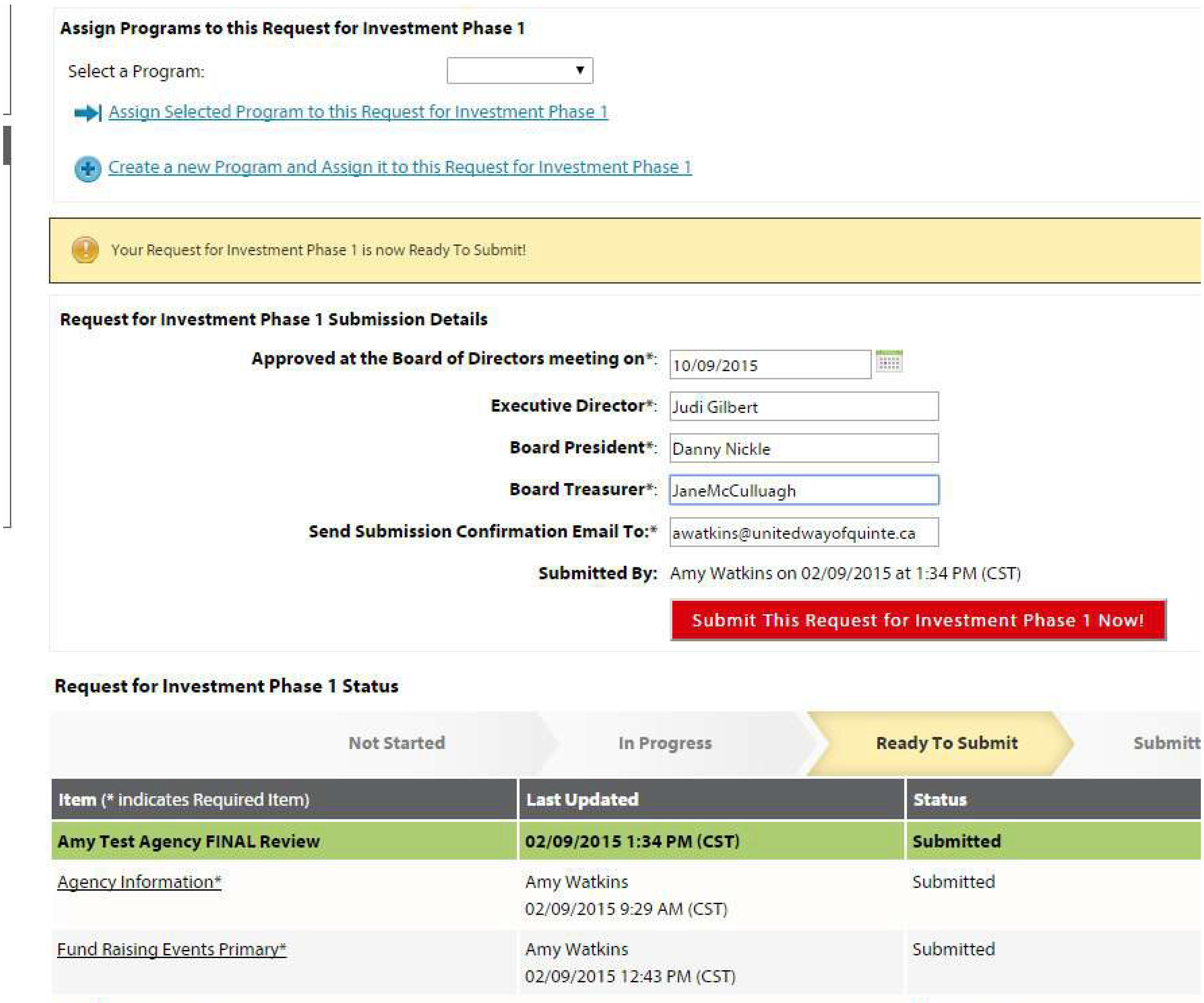


Step 2: Review information, then 'Save My Work and Mark as Completed'

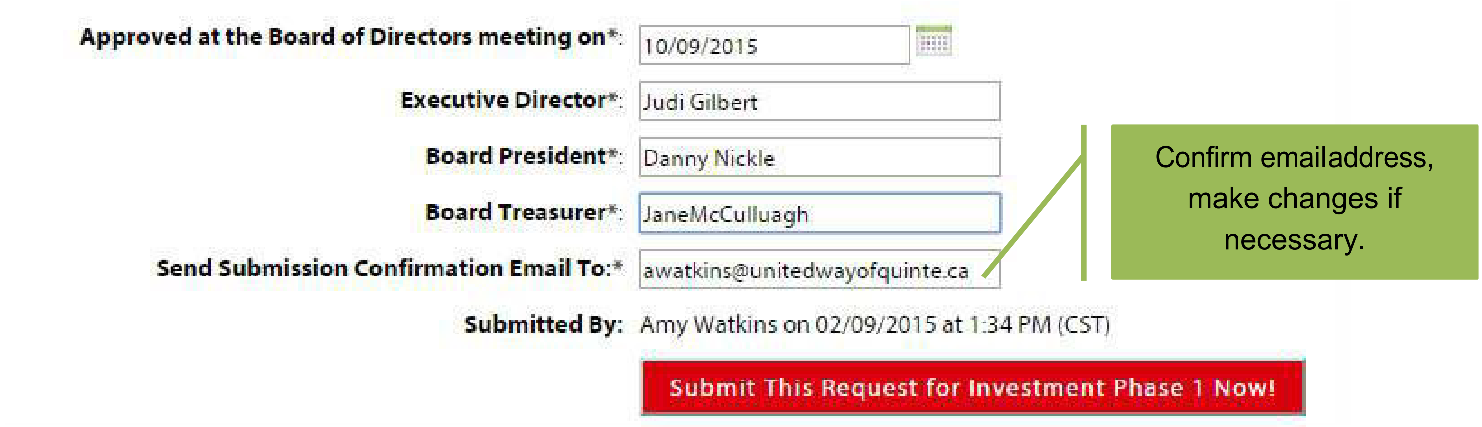
Complete these steps for each form until you have completed the entire application.

Submit!

Once all forms are 'Completed / Ready to Submit', the 'submit this application now' option will appear at the top of the page.

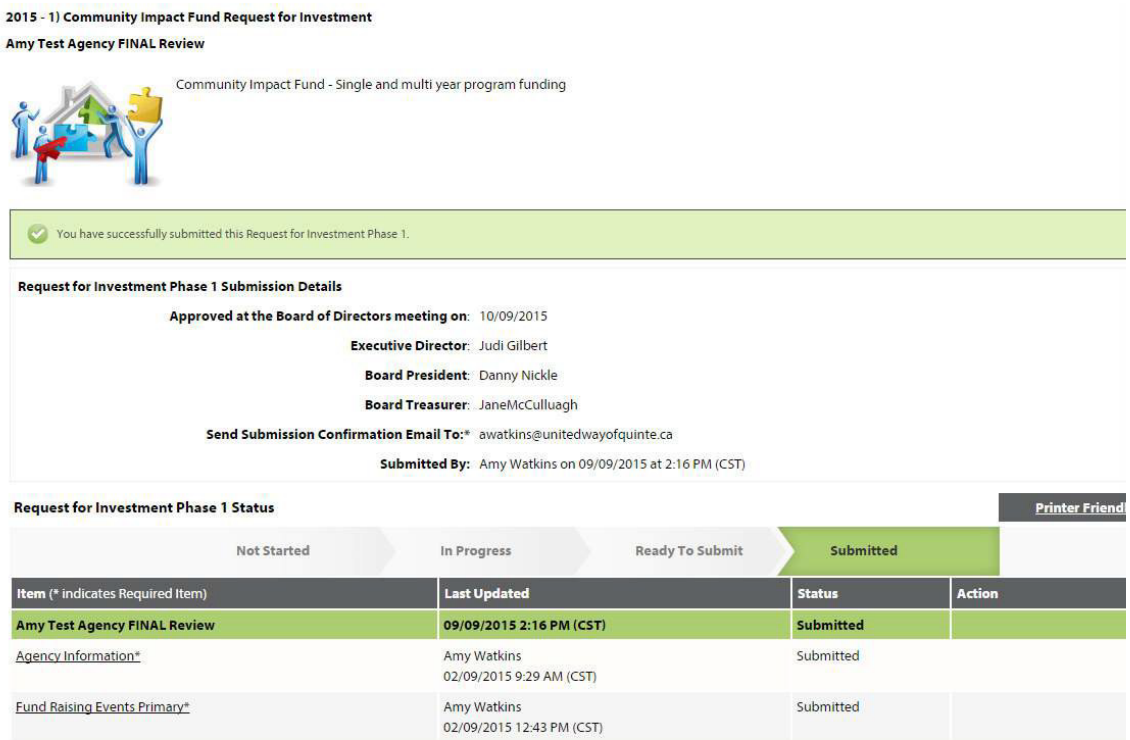


Step 1: Confirm the email address to send the confirmation message.



Step 2: Select 'Submit This Application Now!'

Now that you have successfully submitted your application, you will see everything is now in submitted status.

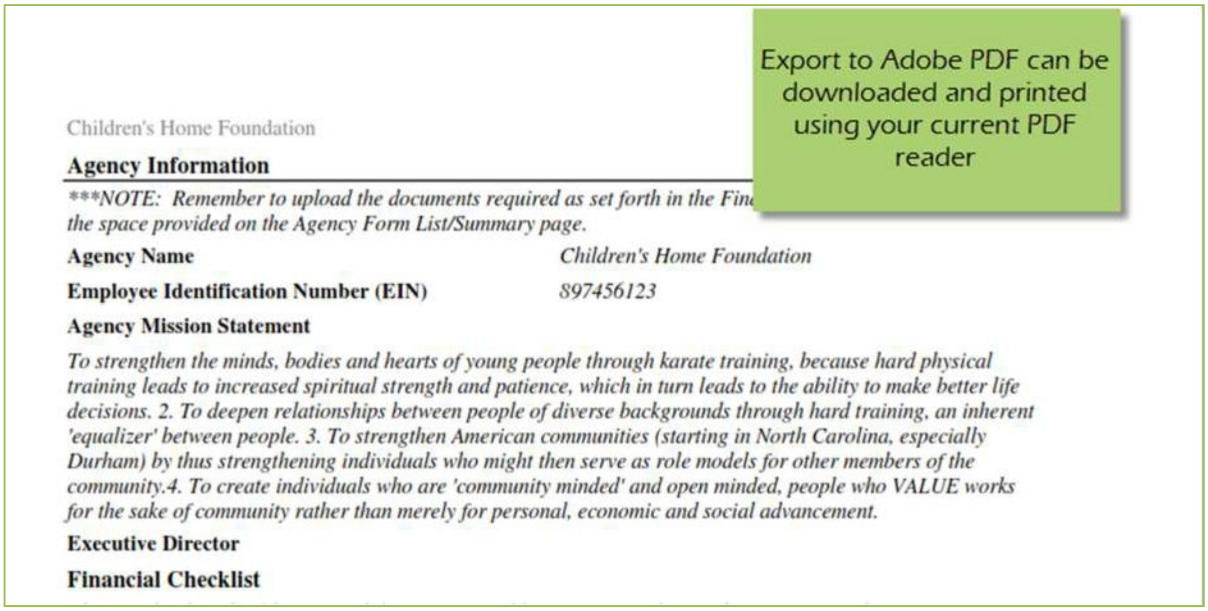


Please note: Once an application is in submitted status you will be able to view the information entered. You will not be able to make any changes to the information.

Printing Options

There are multiple options to print/export your applications:

Export to Adobe PDF - will download an Adobe PDF document into your PDF reader.



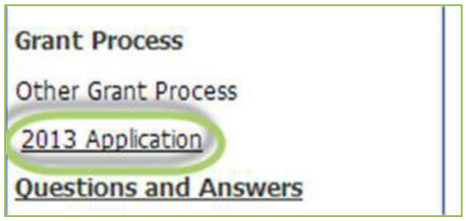
Export to HTML - Opens in a new tab or browser window, and has the option to print.

There are also different levels you may print/export at:

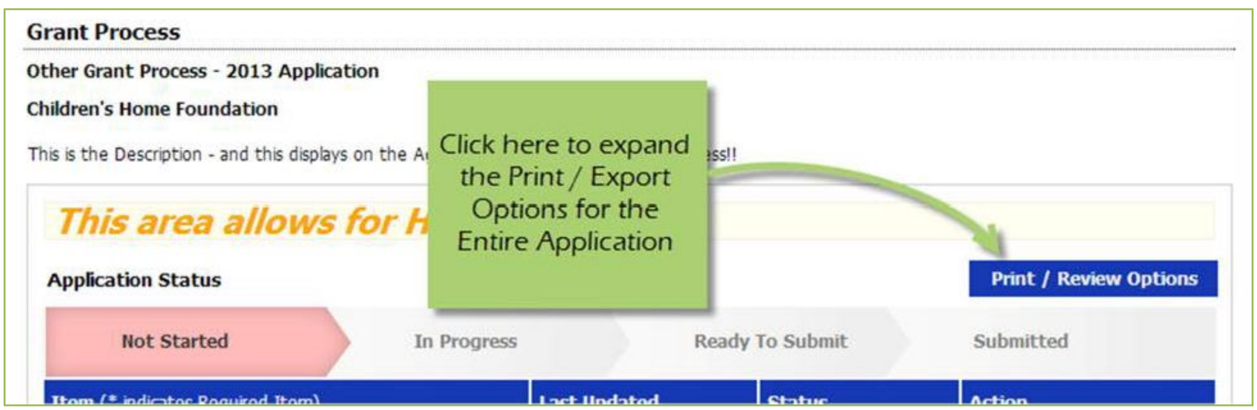
- The Entire Application - This will print or export all forms within this application.
- Agency Packet - This will print all forms that are agency specific.
- Program Packet- This will print all forms that are program specific.
- Individual Form - This will print the individual form.

The Entire Application

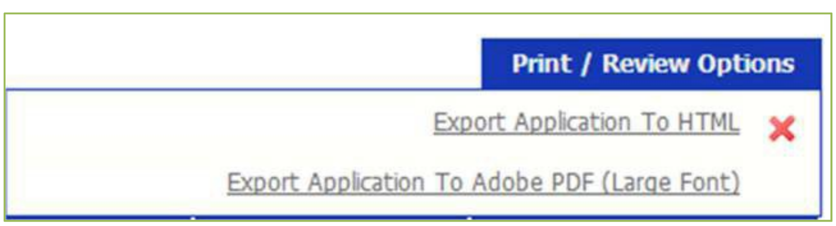
Step 1: Open the application by clicking on it in the left hand navigation.



Step 2: Click on 'Print/Review Options' box in the upper right hand corner of the application main page.

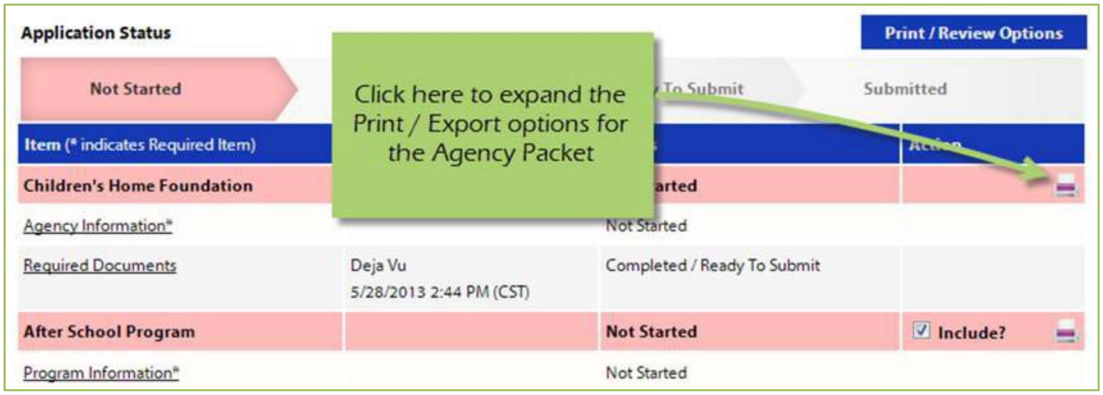


Step 3: Select the print/export option you would like to use, continue on to print.

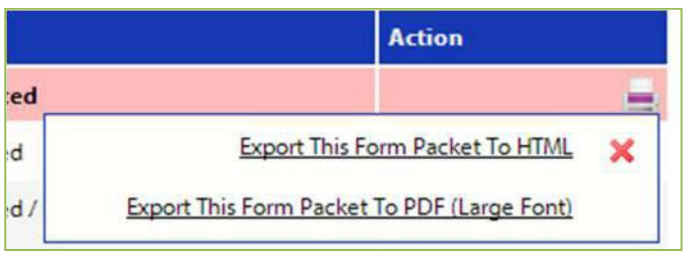


Agency Packet

Step 1: From the application main page, click on the 'Print' icon, in the agency section of the list grid under the action column.

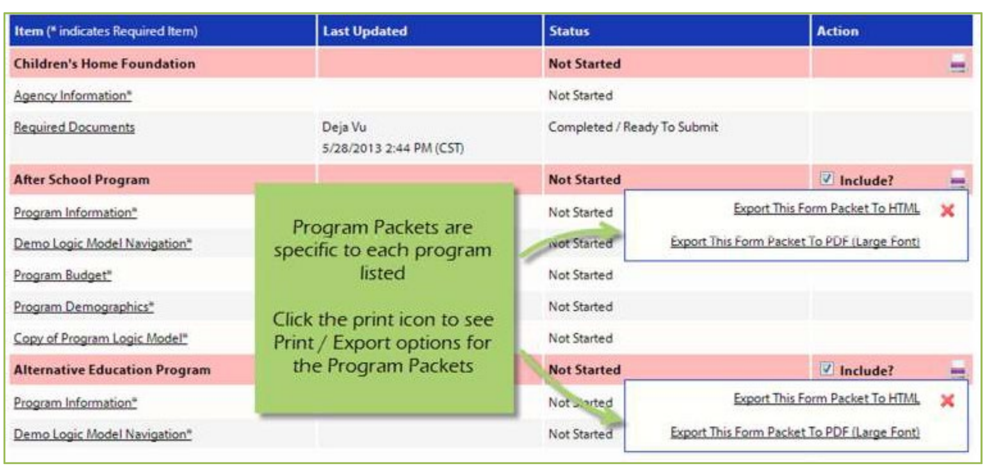


Step 2: Select the 'Print' option you would like to use, continue on to print.



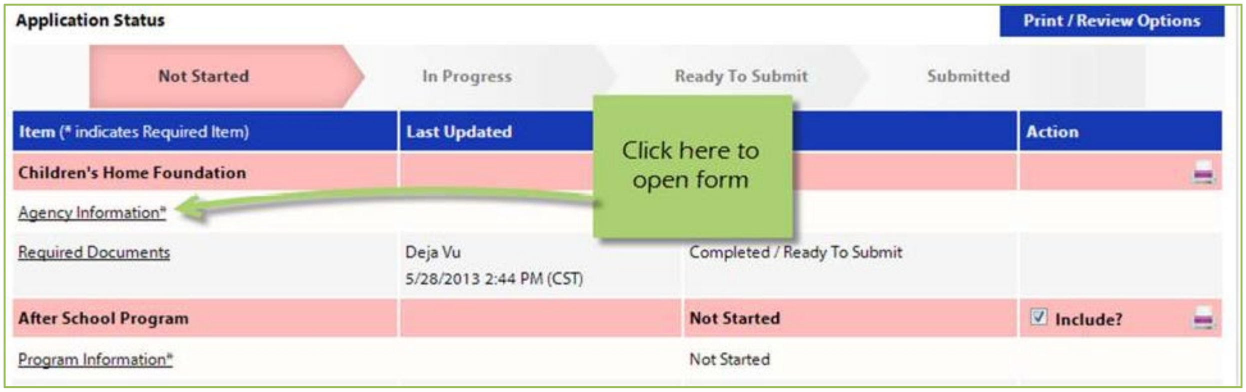
Program Packet

Step 1: From the application main page, click the 'print' icon next to the desired program you would like to print. Then choose which print option to use.

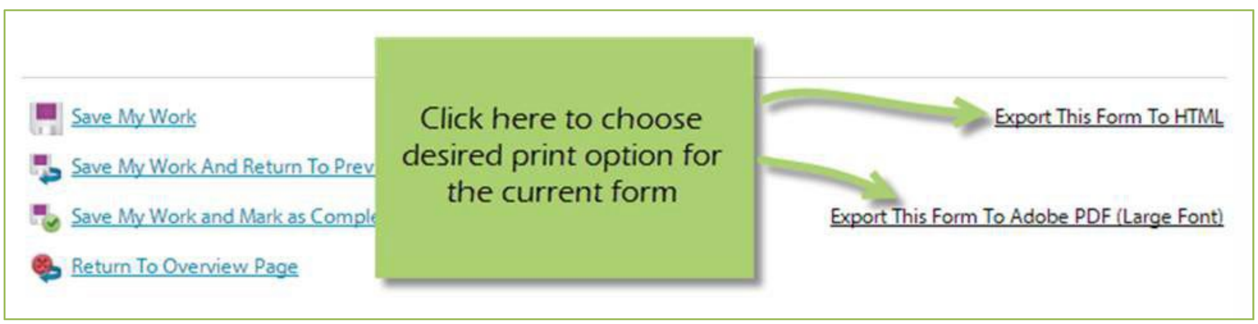


Individual Forms

Step 1: From the application main page, open the form you would like to print.



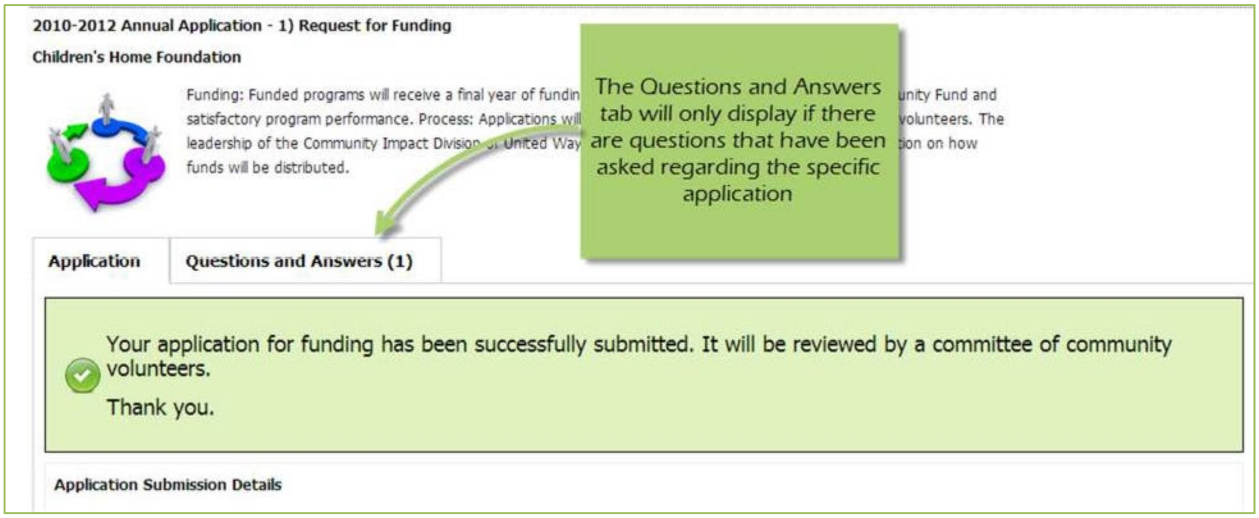
Step 2: In the lower right hand corner of your form are the option for printing.



Questions and Answers

There are two ways to access 'Questions and Answers'.

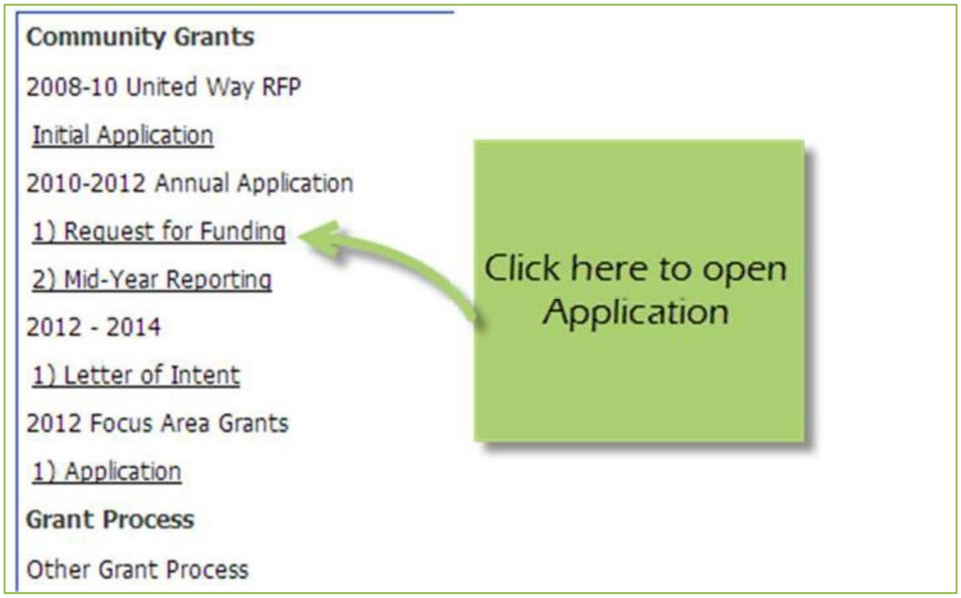
In the Application - a new tab will be added to the application if a volunteer has a question regarding that specific application.



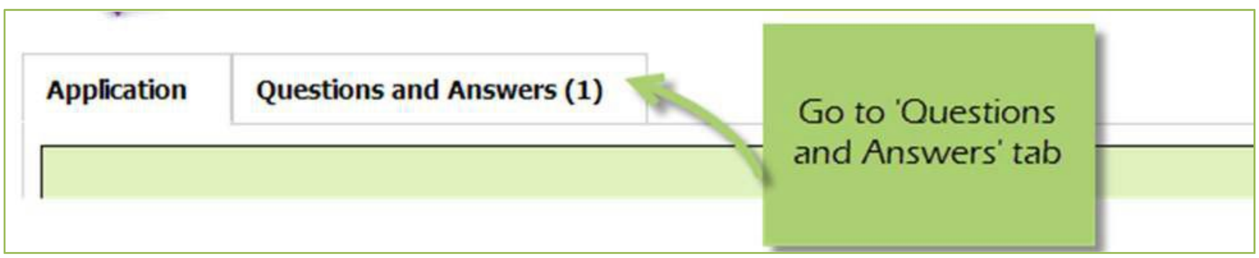
In the left hand Navigation, at the bottom of the investment/application list - All questions and answers will be listed.

Responding to a Question - In the Application

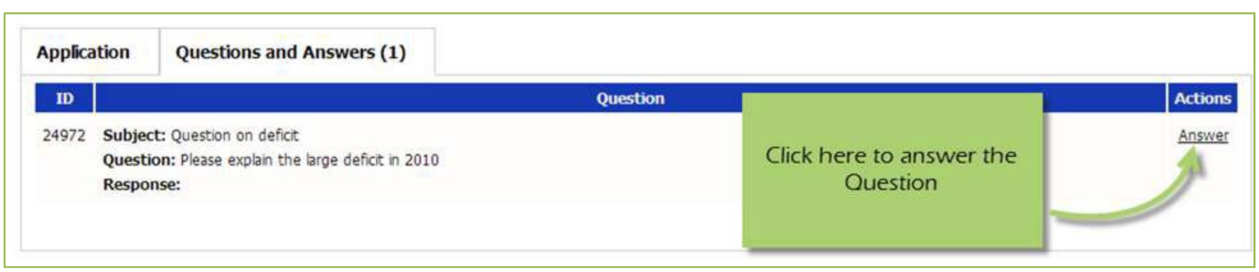
Step 1: Open the application



Step 2: Go to 'Questions and Answers' tab



Steps 3: Select 'Answer' for desired question

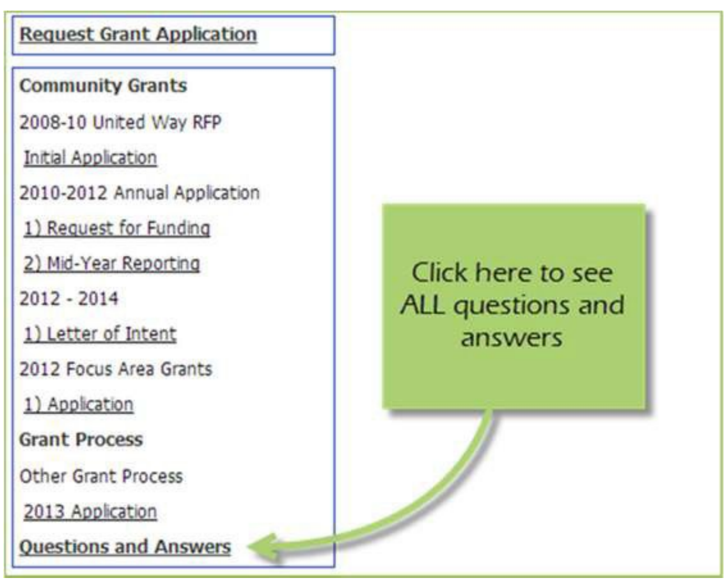


Step 4: Enter your answer to the question, then 'Save and Return to Previous Page'

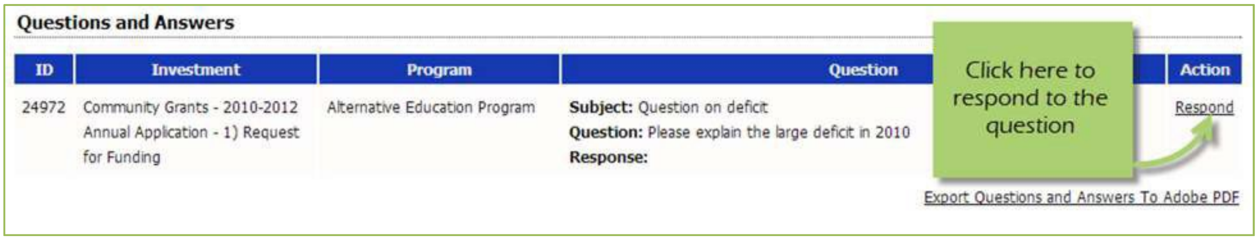
Once the answer is saved, it is approved by Kaitlyn Lalonde, and then displays to the volunteers reviewing your application.

Responding to a Question - From the overall 'Questions and Answers' list

Step 1: Click on 'Questions and Answers' in the left hand navigation



Step 2: Click 'Respond' next to desired question



Step 3: Enter your answer to the question, then 'Save and Return to Previous Page'

Print/Export - Questions and Answers

Currently this can only be done through the overall 'Questions and Answers' area

Applications / Grant Process

Please ensure you review the 2025 Application Guidelines and Supplementary Fundraising Policies document for additional information regarding process, submission timelines, mandatory reporting requirements, and evaluation criteria.

Additional questions can be directed to Kaitlyn Lalonde at:

Phone: 613-962-9531
Email: klalonde@unitedwayhpe.ca